A Profile of British Columbia's Manufacturing Sector

PREPARED FOR MINISTRY OF JOBS, TOURISM AND SKILLS TRAINING
BY BC STATS – 2015

BCStats

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1. Executive Summary

British Columbia's manufacturing sector is an important part of the provincial economy. As a key sector of the BC Jobs Plan it employs a significant percentage of B.C.'s labour force and accounts for a large share of total provincial output. Due to increasingly strong trade ties with China and the strengthening economic recovery in the United States, the outlook for the manufacturing sector in British Columbia appears to be strong in the near term.

1.1. B.C.'s manufacturing sector fourth largest in Canada

B.C.'s manufacturing sector generated nearly $14.3 billion in gross domestic product[1] (GDP) over the course of 2013, placing the province in fourth position with regards to manufacturing sector output among all Canadian provinces.

FIGURE 1: PERCENTAGE SHARE (%) OF TOTAL CANADIAN MANUFACTURING SECTOR GDP BY PROVINCE, 2013

Source: Statistics Canada

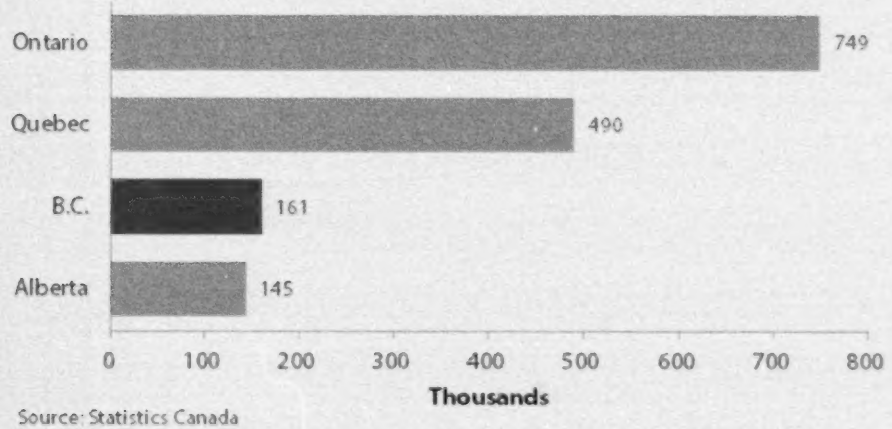
[1] Gross domestic product (GDP) figures quoted in this document are reported in chained (2007) dollars. Note that for chained data, the aggregates are not equal to the sum of their components and, therefore, the sum of the industries will not necessarily equal the "all industries" total.

After outperforming the overall provincial economy for three straight years, the GDP of British Columbia's manufacturing sector remained essentially unchanged in 2013 compared to 2012. By comparison, the economy as a whole grew by about 2% on an annual basis.

1.2. Employment increasing in manufacturing sector

In 2014, B.C.'s manufacturing sector reported a gain in employment of 6.4% over the course of the year, increasing the sector's employed labour force to about 161,000 workers. By comparison, employment growth in the economy as a whole was 0.6%. With the exception of a loss in manufacturing employment during 2013, this continues the trend of increasing employment in the sector since the end of the 2008-2009 economic recession. On the other hand, wage growth, despite being positive, has been slowing down during the same time period and in 2014 wages remained nearly the same compared to the previous year. By comparison, wages increased by 2.4% in all industries of the economy as a whole. In general, B.C. accounts for just over 9% of all jobs in Canada's manufacturing sector, ranking it behind Ontario and Quebec respectively among all provinces in the country.

FIGURE 2: MANUFACTURING EMPLOYMENT BY PROVINCE, 2014



Source: Statistics Canada

1.3. Exports growing at a steady pace

The value of B.C.'s manufactured exports to foreign destinations approached $22.8 billion[2] in 2014, an increase of about 8.3% over the previous year. Since the end of the 2008-2009 economic recession, manufacturing exports have been growing steadily. Exports to China – the now second largest destination for B.C. in terms of value of exported goods – have quadrupled within the past decade. Growth in exports to China has, to an extent, offset the decrease in U.S. demand for B.C.'s manufactured goods during and immediately after the latest recession. Due to a recovering American economy over the past couple of years, exports to the U.S. have picked up once more, providing an additional boon to B.C.'s manufacturers. Elsewhere in Asia, exports to South East Asian countries and South Korea also exhibited solid growth in 2014 as well. At about 6.5%, exports to Western Europe also increased on an annual basis. On the other hand, exports of manufactured goods to Japan declined by nearly 6%, continuing a long-term trend of Japan slipping in the rankings of B.C.'s major export destinations.

FIGURE 3: B.C. MANUFACTURED GOODS EXPORTS, 2014

Destination	Exports ($ millions)	% change (2013/2014)
United States	13,098	11.7
China	4,125	5.1
Japan	1,498	-5.9
Western Europe	1,082	6.5
South East Asia	640	15.4
South Korea	547	16.9
Taiwan	345	5.2
South America	256	-8.4
Hong Kong	178	45.3
Middle East	162	11.1
India	125	15.8
Africa (excluding Egypt)	117	-0.9
Eastern Europe	117	-36.9
Central America & Caribbean	71	4.3
Mexico	66	-7.3
Total	**22,790**	**8.3**

Source: Statistics Canada and BC Stats

[2] With the exception of GDP figures, all other dollar-related indicators in this document are quoted in current dollars.

2. Overview of the Manufacturing Sector

2.1. Introduction

Emerging trends in manufacturing's evolution have begun to alter the competitive landscape. Increases in computer processing power, sophisticated sensor technology, artificial intelligence control systems and other technology advancements are driving the future of the manufacturing footprint in many industries.

Canadian companies have opportunities to grow their market share and enhance their ability to compete among their global peers. In order to do so, manufacturers must place greater emphasis on developing new products and innovative techniques, add design and post-sale services, and increase their speed-to-market. The rewards will be greater participation in global supply chains and the ability to compete in new lucrative markets.

Manufacturing is complex and involves participation from other sectors supplying raw materials, energy, equipment and human intellect. The industry thus supports the creation of high-paying jobs, not just in production plants themselves, but also in areas such as engineering and consulting, software, and specialized skilled trades.

At the core of a strong and sustainable manufacturing industry is effective human capital management. Manufacturers and SMEs that wish to increase their productivity and progress up value chains require institutions that partner with industry to train in the right areas and instruct in an environment that supports technology adoption and innovation.

2.2. Defining the sector

The manufacturing sector includes all establishments that are primarily engaged in the physical or chemical transformation of raw materials or substances into new products. These products may be ready for final consumption or used for further processing and includes related activities such as assembly, blending or finishing.

Manufacturing processes vary considerably among industries. Some are labour intensive, involving limited changes to materials used in production, and in others the process is

highly complex, requiring extensive research and development to bring the product from concept.on to its final form.

A more detailed definition of the manufacturing sector and its many component industries is available in Appendix A.

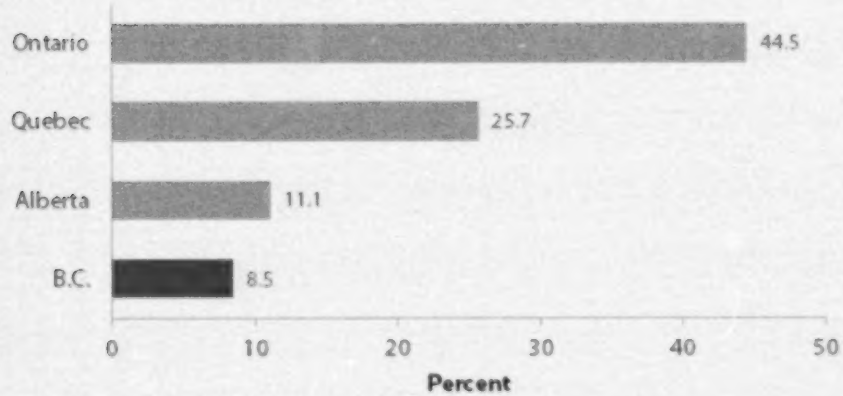
3. Profile and Trends

3.1. Gross Domestic Product

3.1.1. B.C. has fourth largest manufacturing sector in Canada

In 2013[3], the manufacturing sector in B.C. generated about $14.3 billion[4] in output – approximately 8.5% of the total Canadian manufacturing gross domestic product (GDP). By comparison, the manufacturing hubs of Ontario and Quebec accounted for just over 70% of Canada's total manufacturing GDP. In the same time period, Alberta contributed 11.1% of the national total, placing B.C. fourth in terms of manufacturing sector GDP among all the provinces in the country.

FIGURE 4: PROVINCIAL SHARE (%) OF TOTAL CANADIAN MANUFACTURING GDP, 2013



Source: Statistics Canada

3.1.2. Manufacturing fourth largest industry in B.C.

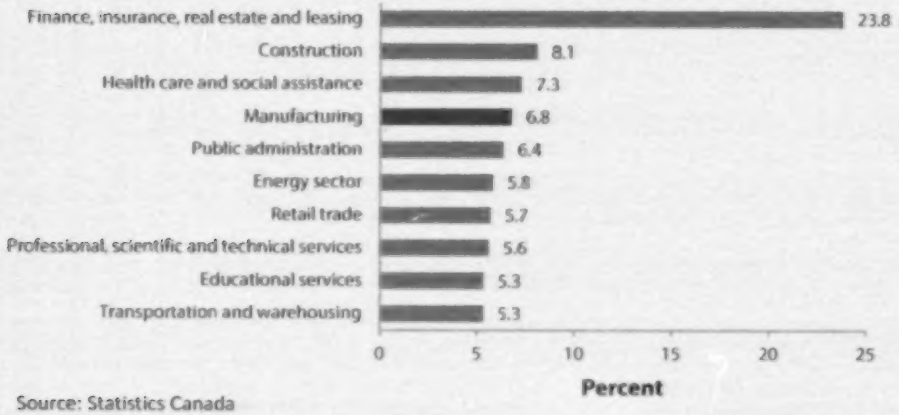
The finance, insurance, real estate and leasing sector generates by far the biggest portion of B.C.'s total GDP. In 2013, approximately 24% of the provincial GDP was produced by the aforementioned industry. The manufacturing sector ranks fourth, with a contribution of nearly 7%. With an 8% share of the total provincial GDP, the

[3] Unlike most other indicators, 2013 is the latest year for which GDP figures by industries were available during the creation of this document.

[4] Gross domestic product (GDP) figures quoted in this document are reported in chained (2007) dollars.

construction industry is the second biggest in B.C. while also being the largest within the goods-producing sector. Health care and social assistance was in third place with just over 7% of total GDP.

FIGURE 5: SHARE (%) OF B.C.'S TOTAL GDP BY INDUSTRIES, 2013

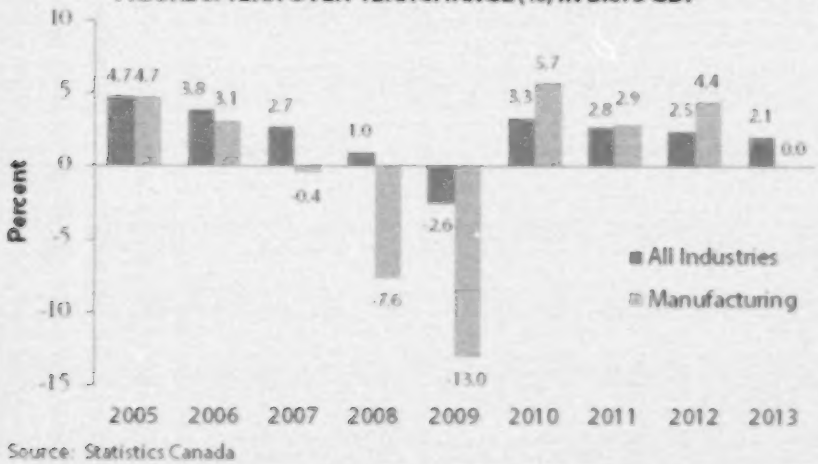


Source: Statistics Canada

3.1.3. Manufacturing GDP growth stabilized after outperforming the B.C. economy in previous years

In 2013, the manufacturing industry in B.C. did not report an increase in GDP relative to 2012. By comparison, the overall economy of the province grew by about 2% within the same time period. After outperforming other industries in the province for three straight years, 2013 was the first year in which the manufacturing sector GDP growth trailed behind the overall economy.

FIGURE 6: YEAR-OVER-YEAR CHANGE (%) IN B.C.'S GDP



Source: Statistics Canada

BC AGRI-FOODS

BC's foods are in demand around the world – with a reputation for producing safe, innovative and great tasting products. The sector is one of the most diverse in Canada, with a growing array of value-added products, including functional foods enhanced for greater health benefits and naturally-sourced health products.

BC's well renowned wine industry, a growing array of high quality niche products is fuelling a competitive offering worldwide, including a number of opportunities for growth and innovation in emerging markets.

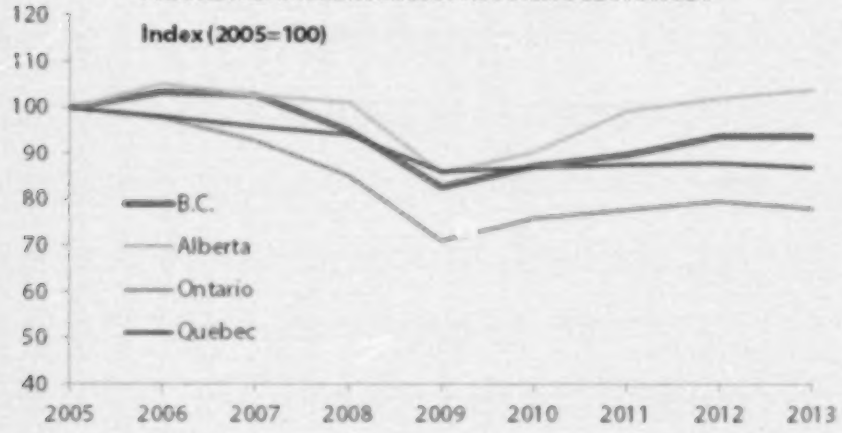
China represents the second largest export market for BC agri-food. Among BC's top exports to China are fruits, seafood and pork products.

Japan continues to be a strong market for BC agrifood products and is the third largest export destination for BC agrifood exports. As the second largest global market for packaged foods, there are potential opportunities for frozen fruits, nuts and bread products as well as other high quality and healthy food products. (Source: Ministry of Agriculture)

3.1.4. B.C. outperformed Ontario and Quebec

The manufacturing sector in B.C. still outperformed the two biggest manufacturing provinces in Canada despite showing no change in GDP for 2013. Relative to the previous year, the manufacturing industry in Ontario contracted by approximately 1.6%, while there was a reduction of nearly 1.0% in Quebec. On the other hand, the manufacturing industry in Alberta outperformed B.C. as it grew by about 2.1% over the same time period.

FIGURE 7: CHANGE IN MANUFACTURING SECTOR GDP



Source: Statistics Canada

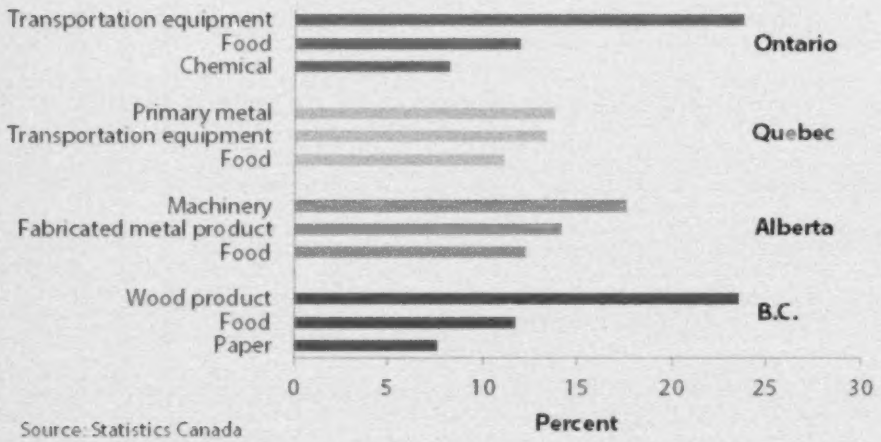
3.1.5. Wood product manufacturing remains the leader

In 2013, wood product manufacturing was by far the largest industry within B.C.'s manufacturing sector, as it accounted for nearly 24% of the sectoral GDP. Despite the fact that demand from the United States declined after the 2008-2009 recession, the industry was buoyed to an extent by continued growth in China. In more recent years, economic recovery in the U.S. has led to a steady rise in housing starts across various states, therefore leading to a rise in demand for wood products made in British Columbia. As a result, the share of manufacturing GDP in the province that wood products account for has now increased to pre-recession levels. In addition, nearly 8% of manufacturing GDP was due to paper manufacturing, exhibiting the continued importance of forestry to the provincial economy.

By comparison, transportation equipment, primary and fabricated metal, and chemical manufacturing were some of the biggest industries in Ontario and Quebec. In Alberta, machinery and fabricated metal production were the two largest industries, while chemical and petroleum product manufacturing were not too far behind. The food

manufacturing industry was relatively similar in size across all major manufacturing provinces, ranking among the larger industries.

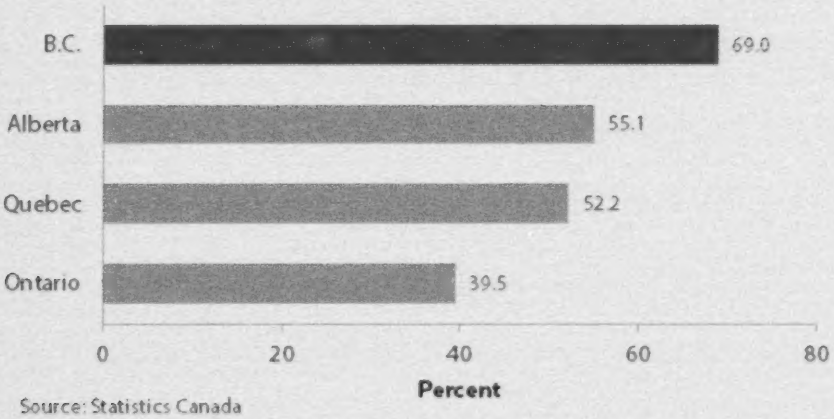
FIGURE 8: TOP INDUSTRIES AS SHARE (%) OF PROVINCIAL MANUFACTURING GDP, 2013



Source: Statistics Canada

In general, the manufacturing sector in B.C. continues to be more reliant on natural resources than other major manufacturing provinces in Canada. In 2013, nearly 70% of B.C.'s manufacturing sector GDP originated from resource-based manufacturing industries. These include food, beverages, wood, paper, petroleum and coal products, non-metallic minerals, primary metal, and fabricated metal manufacturing industries. In contrast, about 40% of the manufacturing sector GDP in Ontario was generated by the aforementioned industries.

FIGURE 9: SHARE (%) OF RESOURCE-BASED INDUSTRIES IN MANUFACTURING GDP, 2013

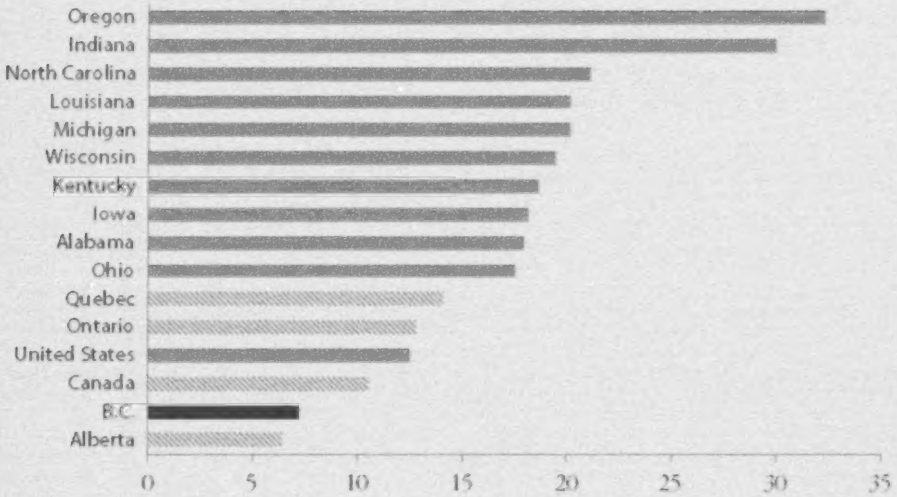


Source: Statistics Canada

3.1.6. Manufacturers play a much larger role in several U.S. states

In 2013, the manufacturing sector in Canada generated about $168.4 billion in GDP – approximately 11% of the national total. By comparison, the manufacturing sector in the United States contributed nearly 12% of national GDP in the U.S. within the same time period. Even though the manufacturing sector's share of output is similar in both countries, there is a very high concentration of manufacturing activities in several regions of the United States. The manufacturing sector's GDP accounts for greater than 30% of the overall economies of Oregon and Indiana. In contrast, the share of manufacturing GDP in Quebec and Ontario is 14% and 13% respectively. In British Columbia, manufacturing accounts for about 7% of the provincial total, which is comparable to states such as Colorado, Delaware and North Dakota.

FIGURE 10: MANUFACTURING SECTOR'S SHARE (%) OF GDP BY SELECT STATES AND PROVINCES, 2013



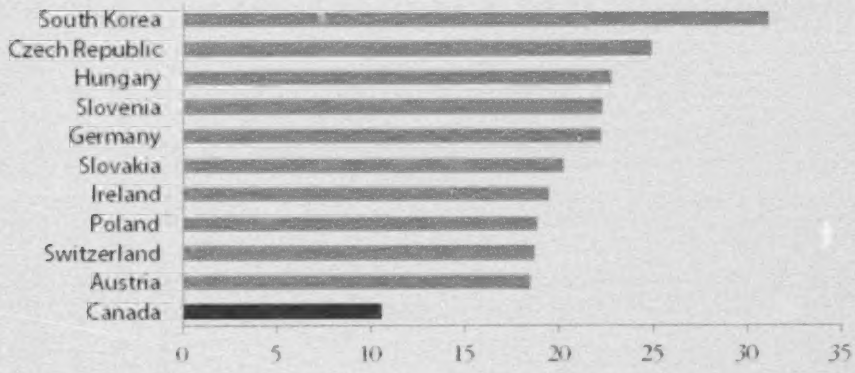
Sources: U.S. Bureau of Economic Analysis and Statistics Canada

Despite being in close proximity, Oregon's manufacturing sector is vastly different from that of British Columbia. The computer and electronic products manufacturing industry accounted for nearly 80% of Oregon's total manufacturing GDP in 2012, while wood products manufacturing contributed only about 3% within the same time period. The rapid growth in Oregon's manufacturing sector started around 2004 and has primarily been driven by the computer and electronic products manufacturing activities. During that time, high-technology component manufacturers began to establish and expand their operations within the state. Consistent increase in global demand for high-technology products has resulted in further growth in output since then.

3.1.7. Manufacturing still a major industry among OECD member states

Despite the global shift of manufacturing activities from developed countries to rapidly developing economies such as China, the manufacturing industry still accounts for a significant portion of GDP among countries with similarly advanced economies as Canada. Among member states of the Organisation for Economic Co-operation and Development (OECD)[5] – the de facto association of highly developed, market oriented economies in the world – South Korea is the only country where the manufacturing sector has had an increasing share of total output over the past decade. In 2013, the manufacturing industry accounted for nearly 31% of the country's GDP. By comparison, the contribution of Canadian manufacturing to the nation's total output ranks well below OECD average. At 11%, the manufacturing sector's share of GDP in Canada is similar to countries such as the United Kingdom, France and the Netherlands.

FIGURE 11: MANUFACTURING SECTOR'S SHARE (%) OF GDP, TOP OECD MEMBERS AND CANADA, 2013



Source: World Bank, OECD and Statistics Canada

BC Food & Beverage

BC's food and beverage processing sector continues to be one of the largest among BC's manufacturing industries.

Strategically located at the crossroads of the Asia-Pacific marketplace, BC's food and beverage processors are uniquely positioned to supply markets across Canada, the US and Asia. While the US remains BC's largest export market, BC products were exported to over 140 markets in 2013.

BC's food processors manufacture a vast array of baked goods and snack items. BC's skilled beverage manufacturers produce internationally-renowned wines from grapes grown in BC's hot Okanagan region, pristine water from BC's natural glaciers, and juices from BC's top-quality fruits and vegetables. BC's brewers and artisan distillers also produce an impressive array of beer, liquors and spirits.

BC's cultural diversity encourages manufacturers to create products for a wide range of regional and ethnic tastes, meeting the diverse taste profiles of consumers around the world. (Source: Ministry of Agriculture)

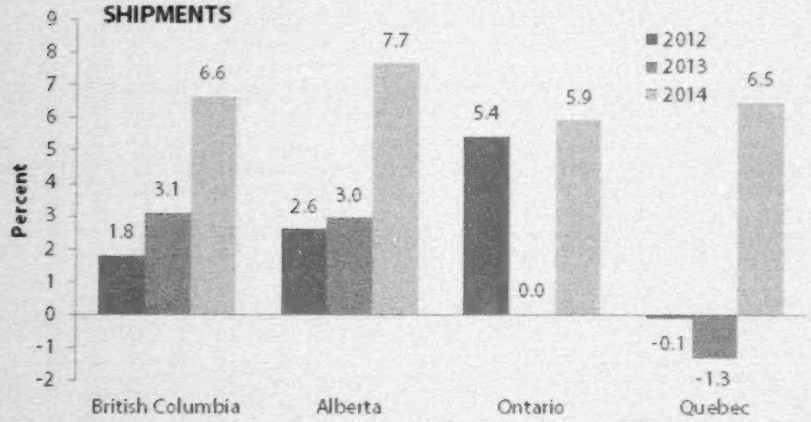
[5] Appropriate to compare Canadian manufacturing sector over time only with similarly advanced OECD economies due to the availability, reliability and comparability of relevant data. Another important commonality is the generally more capital-intensive nature of manufacturing activities among the OECD member states due to high costs of labour.

3.2. Revenue

3.2.1. Manufacturing shipments trending upwards

In 2014, the value of shipments by B.C. manufacturing firms increased – by 6.6% on an annual basis – to $42.8 billion. After experiencing a sharp decline during the 2008-2009 recession, this marked the fifth year in a row during which manufacturers in B.C. experienced an increase in revenues. Moreover, following a disappointing 2013 where shipments by manufacturing firms across the country remained virtually flat; there was a gain of nearly 5.3% during 2014 in Canada as a whole. Ontario and Quebec, the two largest manufacturing provinces, experienced increases in manufacturing shipments of about 5.9% and 6.5% respectively.

FIGURE 12: CHANGE (%) IN VALUE OF MANUFACTURING SHIPMENTS



Source: Statistics Canada

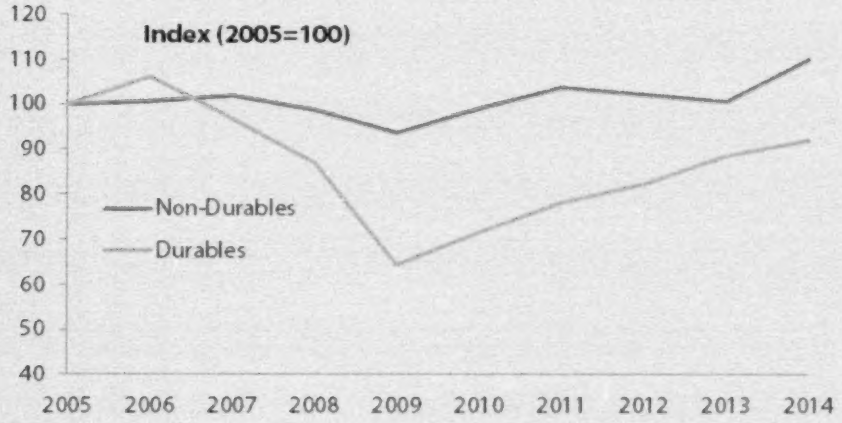
3.2.2. Revenue growth strong across multiple industries

Within the sector in British Columbia, manufacturers of transportation equipment and machinery reported the strongest sales growth at 14.4% and 11.2% respectively. Wood products manufacturers, the biggest industry within the manufacturing sector in the province, also reported a healthy gain of 3.9%, following an even stronger 2013 during which there was an increase of approximately 22.6%. Among the more sizeable industries, only primary metal manufacturing firms experienced a decline in revenues, with an annual decline of about 4.7% in 2014 compared to the previous year. This marked the third year in a row during which firms in the primary metal manufacturing industry have experienced a decrease in value of shipments.

3.2.3. Non-durable goods manufacturers rebound

Led by food and paper manufacturers, the value of shipments of non-durable[6] manufactured goods increased to about $20.1 billion in 2014. This strong growth of nearly 9.5% on an annual basis follows two consecutive years during which manufacturers of non-durable goods in B.C. experienced decreasing revenues. In addition, shipments of durable manufactured goods increased to approximately $22.6 billion in 2014; a change of about 4.2% compared to 2013.

FIGURE 13: CHANGE IN MANUFACTURING SECTOR REVENUE



Source: Statistics Canada

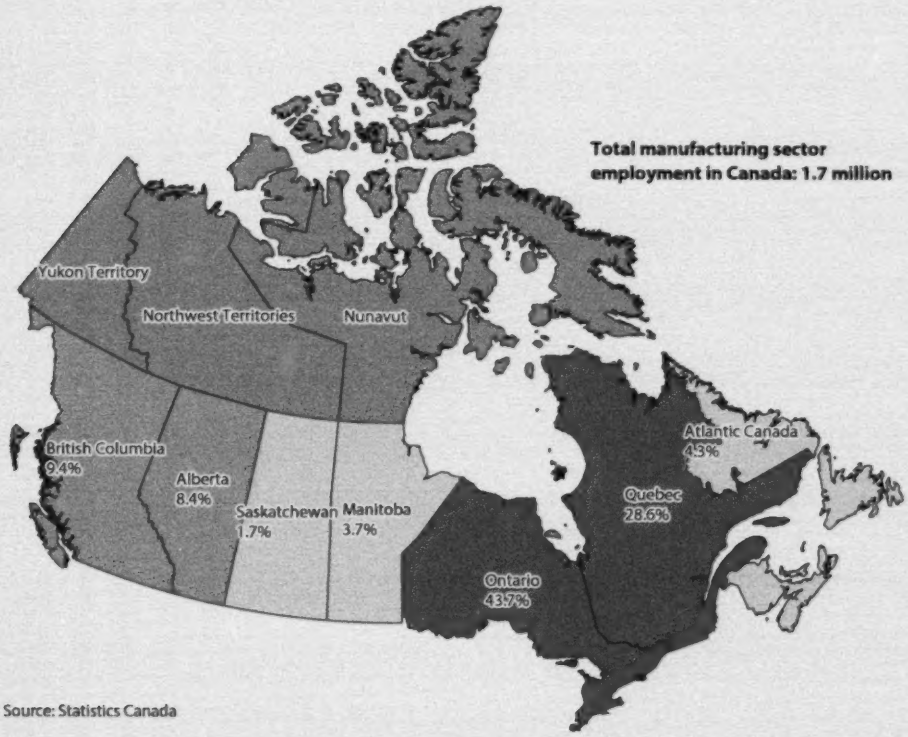
3.3. Employment

3.3.1. B.C. was the third largest contributor to employment in Canada's manufacturing sector

In 2014, there were approximately 161,000 people employed in the manufacturing sector in British Columbia. At 9.4%, B.C. had the third largest share of manufacturing sector workers among all the Canadian provinces. By comparison, just over 72% of all manufacturing jobs in Canada were located in Ontario and Quebec. The manufacturing sector in Alberta employed 8.4% of the national total, placing it slightly behind British Columbia but still well ahead of any other individual province and all of the Atlantic provinces combined.

[6] According to the internationally developed System of National Accounts used by Statistics Canada, non-durable goods are such that they can only be used once for the purposes of either production or consumption, whereas durable goods are defined as being such that they can be used repeatedly or continuously over a period of time greater than one year.

FIGURE 14: PERCENTAGE SHARE (%) OF CANADIAN MANUFACTURING SECTOR EMPLOYMENT BY PROVINCE, 2014

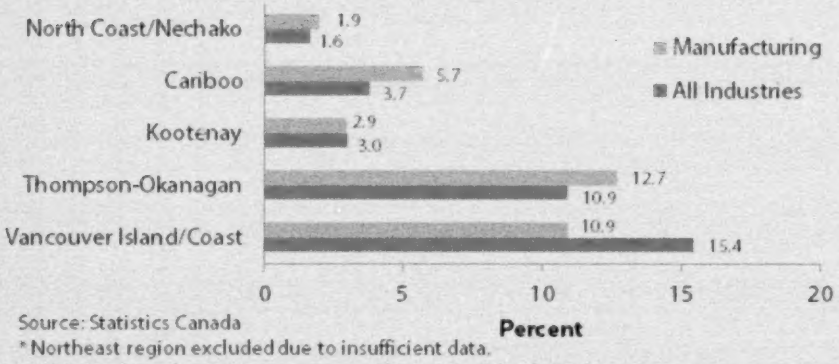


Source: Statistics Canada

3.3.2. Manufacturing is an important employer in BC regions

Within British Columbia, most of the manufacturing employment is concentrated in the Mainland-Southwest development region. Similar to the concentration of employment in other industries within the province, nearly 65% of the employed labour force in the manufacturing sector is located in this region. The development regions of Cariboo, Thompson-Okanagan, and North Coast/Nechako continue to exhibit a fairly high concentration of manufacturing employment relative to their overall labour force. Despite losses in manufacturing employment since their respective historical peaks, the manufacturing sector remains a strong employer in all three regions.

FIGURE 15: REGIONAL EMPLOYMENT AS PERCENTAGE SHARE (%) OF PROVINCIAL TOTAL, 2014

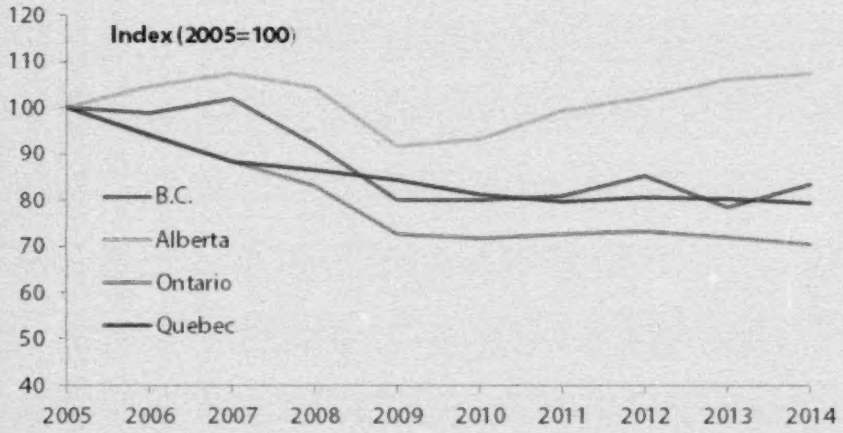


Source: Statistics Canada
* Northeast region excluded due to insufficient data.
** Mainland-Southwest region accounts for nearly 65% of all jobs in the province, hence it was excluded to more prominently render the variation in other regions.

3.3.3. British Columbia manufacturers fared better than others in 2014

After losing close to 7.9% of manufacturing jobs in 2013, B.C. bounced back in 2014 with a gain in employment of about 6.4% over the course of the year. In contrast, employment levels within the manufacturing industry declined in Canada as whole, with both Ontario and Quebec experiencing further job losses in the sector.

FIGURE 16: CHANGE IN MANUFACTURING EMPLOYMENT



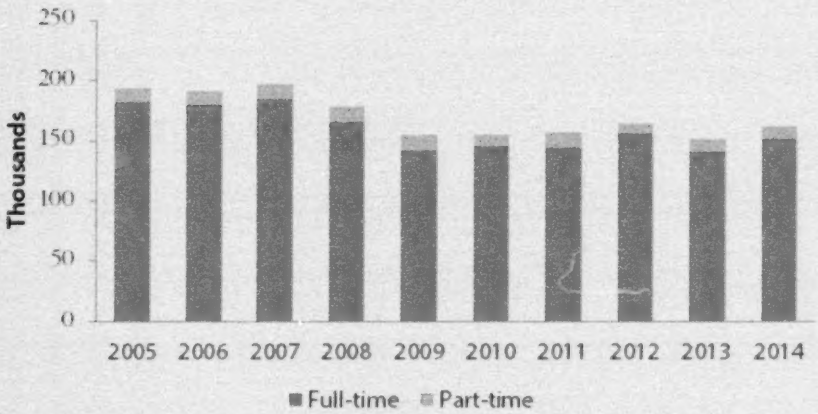
Source: Statistics Canada

3.3.4. Full-time jobs drive growth

Most of the job growth in the manufacturing sector occurred in the form of full-time employment. Compared to the previous year, there was an increase of about 7.4% in full-time manufacturing employment in 2014. On the other hand, there was a 5.4% decline in part-time manufacturing jobs within the same time period.

The manufacturing sector continues to employ a considerably lower share of part-time workers than full-time ones. In 2014, only about 6.8% of the employed labour force in manufacturing was part-time. In contrast, about 21.8% of the employed labour force was part-time across all sectors in British Columbia. In general, the proportion of part-time employment relative to total employment in B.C. is similar to other provinces in Canada.

FIGURE 17: MANUFACTURING EMPLOYMENT IN B.C.



Source: Statistics Canada

3.3.5. Employment growth in manufacturing sector stronger than the rest of the economy

Employment in the manufacturing industry grew much faster than employment in all other industries in British Columbia. Total employment in B.C. was about 0.6% higher in 2014 when compared to 2013, increasing the manufacturing sector's share of the provincial employed labour force to nearly 7.1%. The manufacturing sector remains the second largest employer within the B.C. goods-producing sector–behind only the construction industry (about 8.8% of the employed labour force) and the seventh largest employer overall after several service-producing sectors.

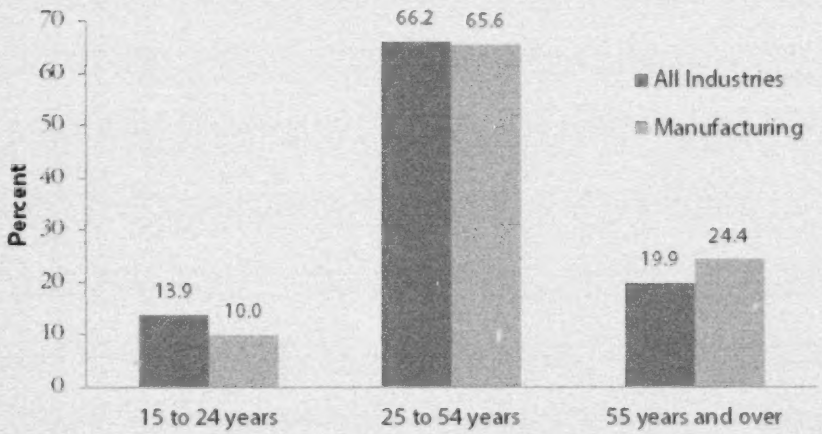
FIGURE 18: TOP SECTORS IN B.C. (2014 EMPLOYMENT)

Source: Statistics Canada

3.3.6. Manufacturing workers are getting older

The proportion of older workers in B.C.'s manufacturing sector has steadily increased over the past several years. In 2014, nearly 24% of the employed labour force in the industry was 55 years or older. The increase in older workers is being offset by a decrease in core working age employees (individuals between the ages of 25 to 54) within the sector. The ageing of the labour force in the manufacturing industry is reflective of some general demographic trends in the province and the country as a whole. As the "baby boom" generation continues to age, the proportion of older workers in the labour force continues to rise across most industries in Canada. However, the manufacturing industry generally has an older age profile than other sectors of the economy.

FIGURE 19: AGE PROFILE OF EMPLOYED LABOUR FORCE IN BRITISH COLUMBIA AS A SHARE (%), 2014

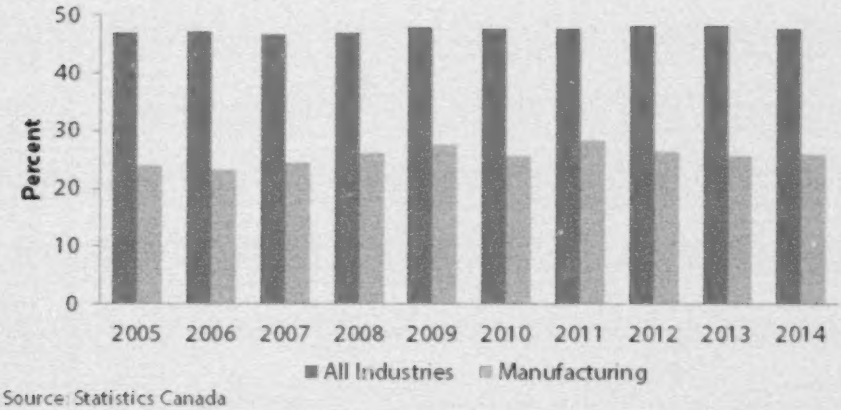


Source: Statistics Canada

3.3.7. Nearly a quarter of the manufacturing jobs belong to women

In 2014, approximately 26% of the employed labour force in the manufacturing sector of B.C. was female. The proportion of female workers within the manufacturing industries in B.C. is similar to other provinces in Canada. By comparison, nearly 48% of the employed labour force across all sectors in B.C. is female.

FIGURE 20: SHARE (%) OF FEMALE EMPLOYEES IN B.C.'S LABOUR FORCE

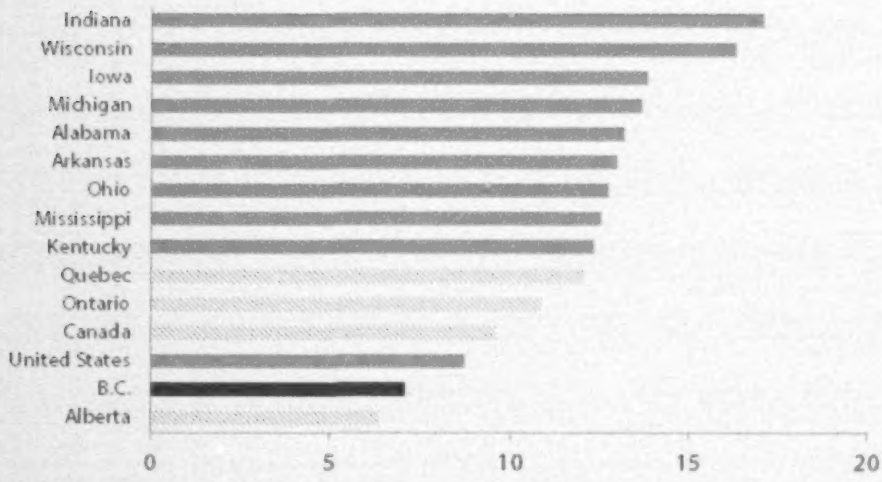


Source: Statistics Canada

3.3.8. U.S. manufacturers tend to employ a much larger share of workers

In 2014, about 12.1 million people – nearly 8.7% of the national employed labour force in the United States – were working in the manufacturing sector. At 9.6%, the proportion of workers employed in the manufacturing sector is higher in Canada. However, the share of manufacturing employment in B.C. (7.1%) is much lower than most American states. At about 11% and 12% respectively, Ontario and Quebec employ a comparable share of their labour force in the manufacturing sector as major U.S. manufacturing states such as Pennsylvania and Ohio.

FIGURE 21: MANUFACTURING SHARE (%)OF EMPLOYMENT BY STATE, 2014



Source: U.S. Bureau of Labor Statistics and Statistics Canada

3.3.9. Manufacturing employment growth hanging back in Canada

In Canada, employment in the manufacturing sector declined by 0.7% over the course of 2014. During the same time period, manufacturing employment increased by about 1.1% in the United States. The U.S. has experienced yearly increases in manufacturing employment since 2010. On the other hand, employment in the manufacturing sector has generally been on a decline in Canada since the end of the 2008-2009 recession. Since 2005, Ontario, in particular, has seen a bigger drop in manufacturing employment than any U.S. state. By comparison, B.C. has performed better than most major Canadian provinces or U.S. states, albeit with a comparatively small initial level of manufacturing sector employment.

Global Value Chains

Advances in technology and enabling policy environments are allowing businesses to internationalize their operations across jurisdictional boundaries to increase efficiencies, lower costs and speed up production.

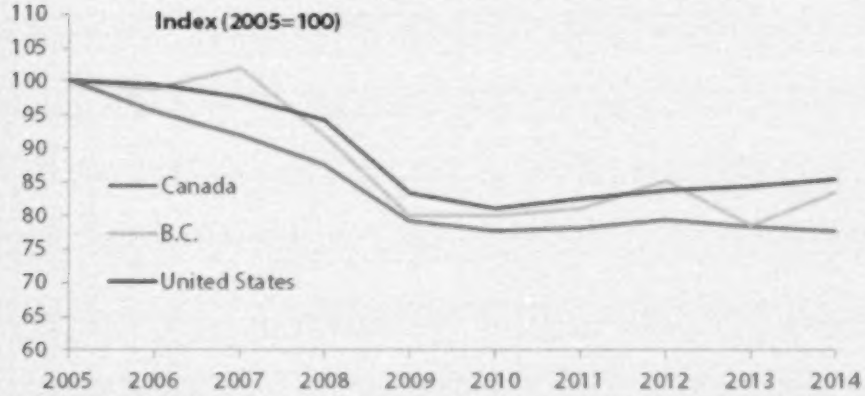
This model applies well to manufacturing - enabling businesses to compete on the world-stage by participating in global value chains which span R&D, supplier sourcing, production, and post-services.

Businesses operating in a global value chain world will need to be nimble to face a range of rapidly changing issues from information technology shifts, consumer behaviour fluctuations, to changes in logistics.

A unique partnership with the Aerospace Industries Association of Canada Pacific will connect BC's aerospace companies to global value chains. A commitment to enhance market access, improve BC's aerospace industrial capabilities and pursue supplier development programming will better prepare BC manufacturers to capitalize on supply chain opportunities.

Educational and skills training institutions will also play key roles in helping BC companies attain international skill standards expected of participants in global value chains. (Source: Ministry of Jobs, Tourism and Skills Training)

FIGURE 22: CHANGE IN MANUFACTURING EMPLOYMENT

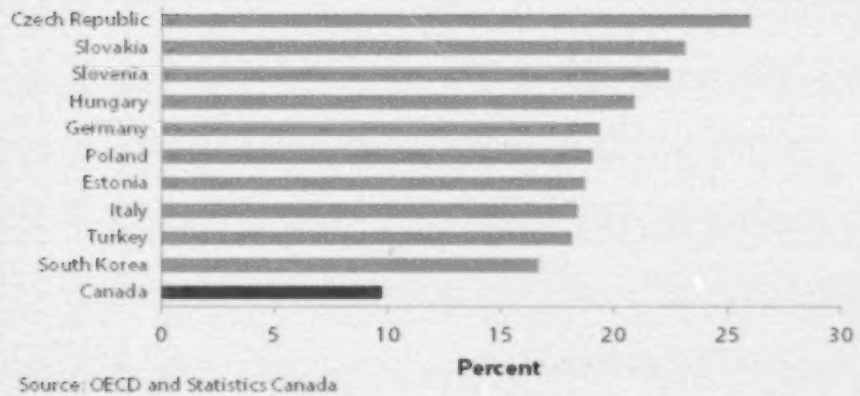


Source: U.S. Bureau of Labor Statistics and Statistics Canada

3.3.10. Manufacturing sector a major source of employment across the OECD

Despite the increasing concentration of global manufacturing activities in China over the past decade, the manufacturing sector remains an important source of employment among the advanced economies of the OECD. Since 2005, countries such as Chile, Israel, South Korea and Poland have experienced gains in manufacturing sector employment, while various other OECD member states such as the Czech Republic, Germany and Switzerland have also posted strong manufacturing employment figures over the same time period. By comparison, the contribution of the manufacturing sector to Canada's total employed labour force is much smaller. In 2013, approximately 9.8% of all employment in Canada was in the manufacturing sector. This is well below the OECD average and comparable to countries such as the United Kingdom, Greece and Sweden. In contrast, the German manufacturing sector – largest among the European Union member states – employed about 19.3% of the country's labour force in the same year.

FIGURE 23: MANUFACTURING SECTOR'S SHARE (%) OF EMPLOYMENT, TOP OECD MEMBERS, 2013



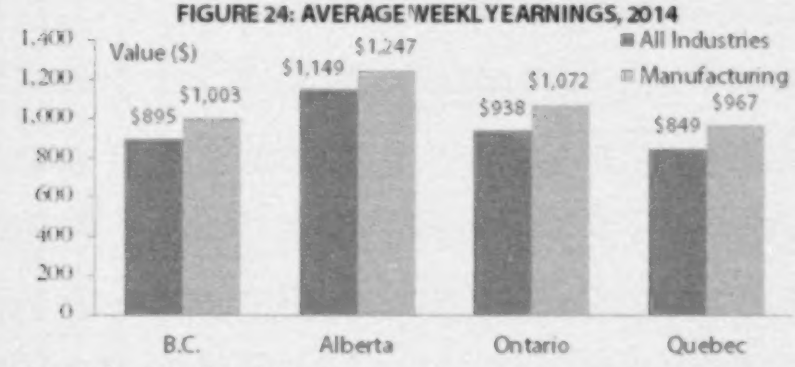
Source: OECD and Statistics Canada

3.4. Wages and Salaries

3.4.1. B.C. manufacturing sector has the third highest wages in Canada

Out of the four major manufacturing provinces in the country, wages in B.C. were third highest in the manufacturing sector. In 2014, average weekly earnings for a worker in the manufacturing sector were $1,003 in British Columbia. At $1,247 per week, Alberta had the highest wages in the sector, while Quebec had the lowest out of all the major manufacturing provinces at $967 per week. In every province, average wages in the manufacturing sector were substantially higher than average wages across all sectors combined.

FIGURE 24: AVERAGE WEEKLY EARNINGS, 2014

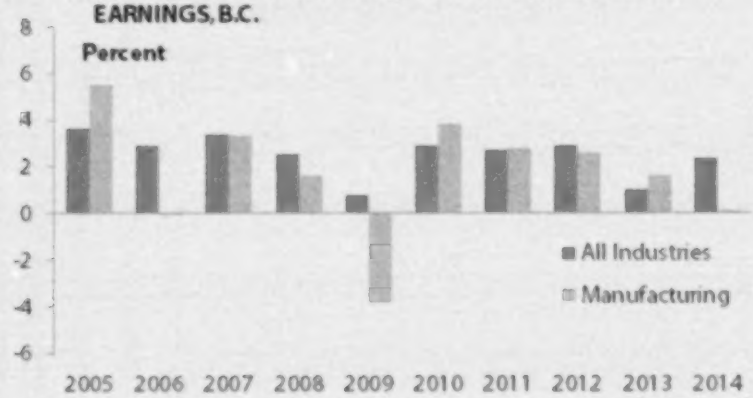


Source: Statistics Canada

3.4.2. Manufacturing sector wages have recovered since the 2008/09 recession

In B.C. and Canada as a whole, wages within the manufacturing sector were impacted more by the most recent recession than other sectors in the economy. In 2009, average weekly earnings in the manufacturing sector fell by nearly 4% in British Columbia. Wage growth in the economy as a whole was subdued but remained positive within the same time period. For those still employed within the sector after the 2008-2009 recession, wages bounced back strongly the very next year. However, since 2010, wage growth in the manufacturing sector in B.C. has been trending downwards and in 2014, there was virtually no change in wages at all. By comparison, growth in average weekly earnings has been relatively steady averaging about 2.4% annually across all sectors of the economy in British Columbia.

FIGURE 25: ANNUAL CHANGE (%) IN AVERAGE WEEKLY EARNINGS, B.C.



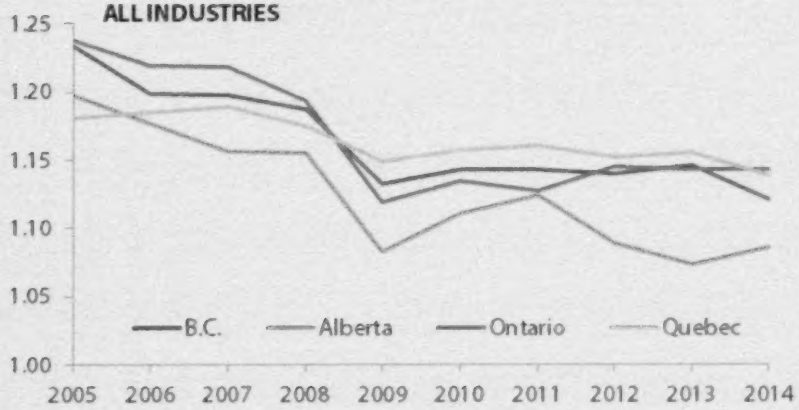
Source: Statistics Canada

3.4.3. Manufacturing sector wages converging with the rest of the economy

Even though workers in the manufacturing sector have generally enjoyed higher wages than workers in most other industries in the economy, there has been a general trend towards convergence in all the major manufacturing provinces in Canada. In 2005, average weekly earnings in the manufacturing sector were over 20% higher than average weekly earnings in B.C.'s economy as a whole. However, in 2014, average weekly manufacturing sector earnings were about 12% higher. Despite the trend towards convergence within provinces, average weekly earnings across the major manufacturing

provinces are in fact diverging, as wage growth in Alberta's manufacturing sector has been much stronger than elsewhere in the country.

FIGURE 26: MANUFACTURING SECTOR WAGES RELATIVE TO ALL INDUSTRIES

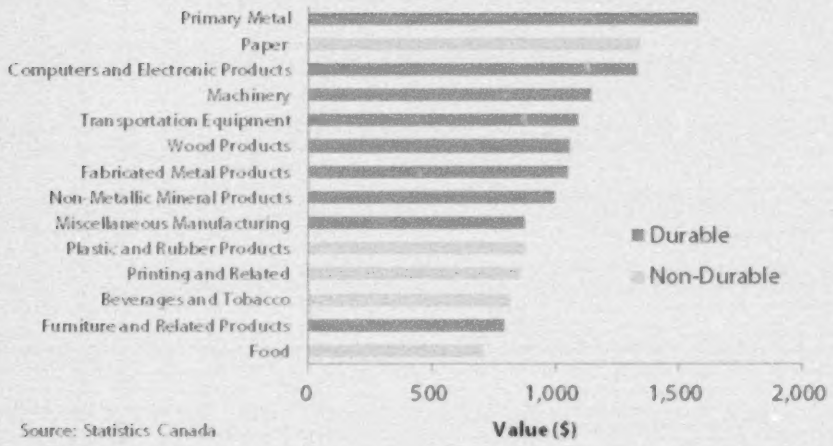


Source: Statistics Canada

3.4.4. Wages in durable goods industries much higher than in non-durable goods

In 2014, average weekly wages for workers in durable goods producing manufacturing industries were approximately $1,081. By comparison, average weekly earnings in non-durable goods industries were about $889. With the exception of paper manufacturers, durable goods producing industries in general had higher wages than non-durable goods producing industries within the manufacturing sector in British Columbia. At $1,582, average weekly wages in the highest paying manufacturing industry – Primary Metal – were more than double the average weekly wages in Food products, the lowest paying manufacturing industry.

FIGURE 27: AVERAGE WEEKLY EARNINGS, 2014

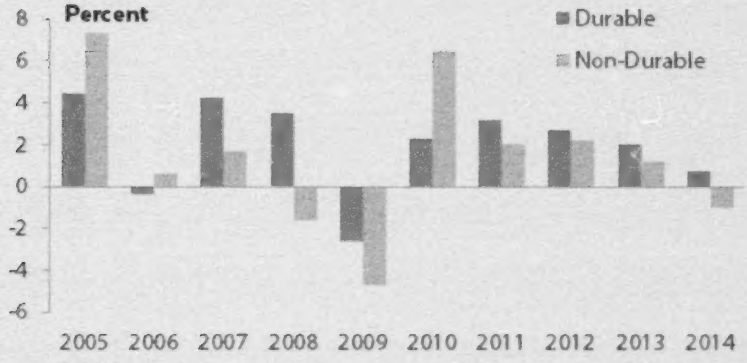


Source: Statistics Canada

3.4.1. Wage growth falling behind in non-durable goods producing industries

Even though the 2008-2009 economic recession had a negative impact on wages across all industries within the manufacturing sector, the decline in wages was more pronounced within the non-durable goods producing industries. Despite a robust recovery since then, wage growth in durable goods producing industries has been comparatively more steady than in the non-durables. In general, potentially due to a smaller employed labour force, annual changes in average weekly earnings in the non-durable goods producing industries can be quite volatile. In addition, average weekly earnings in 2014 dropped by about 1% in non-durable goods industries within British Columbia. By comparison, there was an increase of nearly 1% in the durable goods producing sector.

FIGURE 28: ANNUAL CHANGE (%) IN AVERAGE WEEKLY EARNINGS, B.C.



Source: Statistics Canada

3.5. Business Counts

3.5.1. Manufacturing firms account for a small portion of total number of businesses

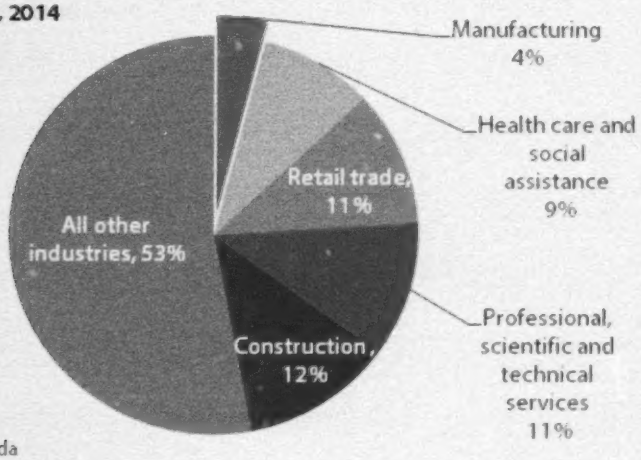
In 2014, there were about 7,275 manufacturing establishments[7,8] with at least one employee in the province of British Columbia. Producers of goods such as medical equipment, jewellery, sporting equipment, toys and office supplies – collectively classified as "miscellaneous" manufacturers – accounted for nearly 930 firms, making them the most ubiquitous type of establishment within the manufacturing sector. Fabricated metal product, food, wood product, and furniture and related product manufacturers rounded out the top five manufacturing industries within the province in terms of business counts.

In total, manufacturing firms accounted for nearly 4% of all establishments in the province. At nearly 12%, the construction sector had the highest amount of firms in both the goods producing sector and the economy as a whole. Professional, scientific and technical services, and retail trade round out the top three with 11% of all businesses in British Columbia each.

[7] This figure only includes manufacturing firms that generate revenue greater than $30,000.

[8] The approximately 4,600 manufacturing firms in B.C. with no employee payroll are excluded, even though they may still have a workforce consisting of contracted workers, family members or business owners.

FIGURE 29: SHARE (%) OF TOTAL ESTABLISHMENTS BY SELECT SECTORS, 2014

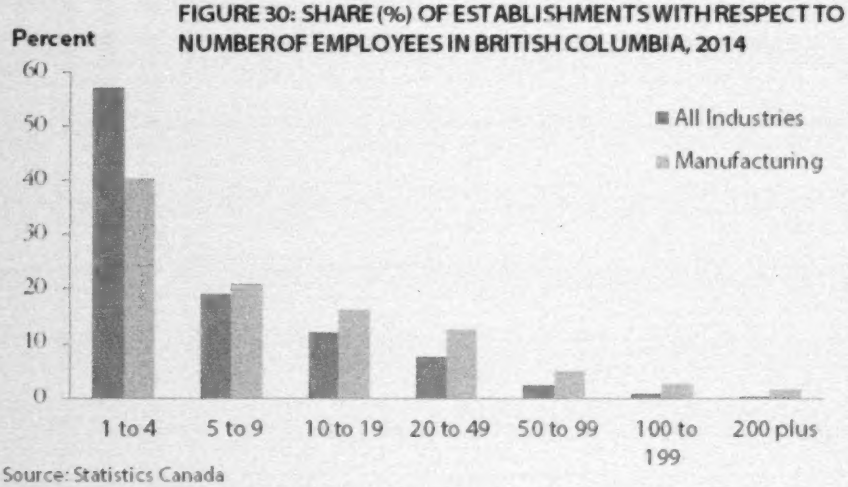


Source: Statistics Canada

3.5.2. Manufacturing firms employ more workers on average

Across all industries in British Columbia, approximately 57% of all establishments employed between 1 and 4 workers in 2014. However, at 40%, the proportion of firms that only employed 1 to 4 workers is much smaller within the manufacturing sector. Compared to 11% across firms in all industries, about 22% of manufacturing firms employ 20 or more workers.

FIGURE 30: SHARE (%) OF ESTABLISHMENTS WITH RESPECT TO NUMBER OF EMPLOYEES IN BRITISH COLUMBIA, 2014



Source: Statistics Canada

Apparel Manufacturing in B.C.

Apparel manufacturing comprises establishments primarily engaged in manufacturing clothing and clothing accessories with product lines including active wear, luxury undergarments, fashion clothing, technical outerwear, and survival wear. In addition, there are many high value-added activities associated with apparel manufacturing such as design, R&D, branding, merchandising, marketing, logistics and distribution headquartered in Canada.

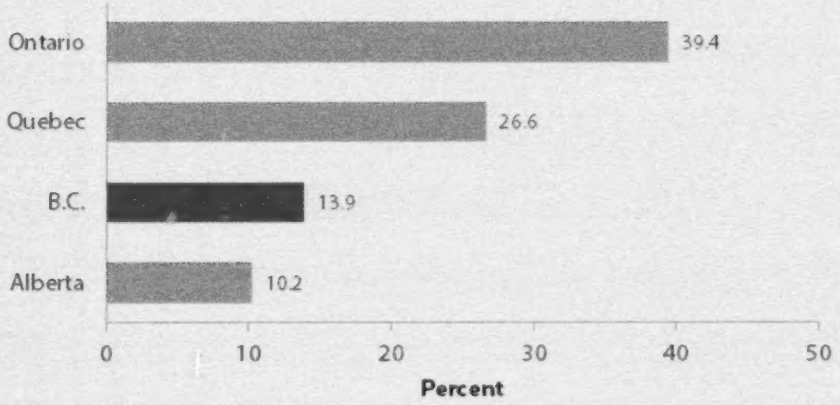
The BC apparel industry produces a wide range of apparel products for domestic and foreign markets. By adopting new technologies and automating processes throughout the supply chain, leading provincial apparel manufacturers are globally competitive. Many recognizable global brands are BC companies, such as Arc'teryx, Lululemon and Herschel Supply.

BC apparel manufacturing firms are moving towards niche markets, designing and producing high-end clothing, as well as speciality performance apparel such as sportswear and protective clothing. Technical textile is emerging as an important contributor in the advancement of new apparel products for protection against external influences and for safety in the military, defence and security markets. (Source: Ministry of Jobs, Tourism and Skills Training)

3.5.3. B.C. has the third most manufacturing firms in Canada

In 2014, nearly 14% of all manufacturing firms in the country were located in British Columbia, the third most among all Canadian provinces. By comparison, approximately 67% of all manufacturing firms in Canada were located in the manufacturing hubs of Ontario and Quebec. Home to nearly 10% of all manufacturing firms in Canada, Alberta ranked fourth among the major manufacturing provinces in the country.

FIGURE 31: SHARE (%)OF TOTAL CANADIAN MANUFACTURING FIRMS, 2014



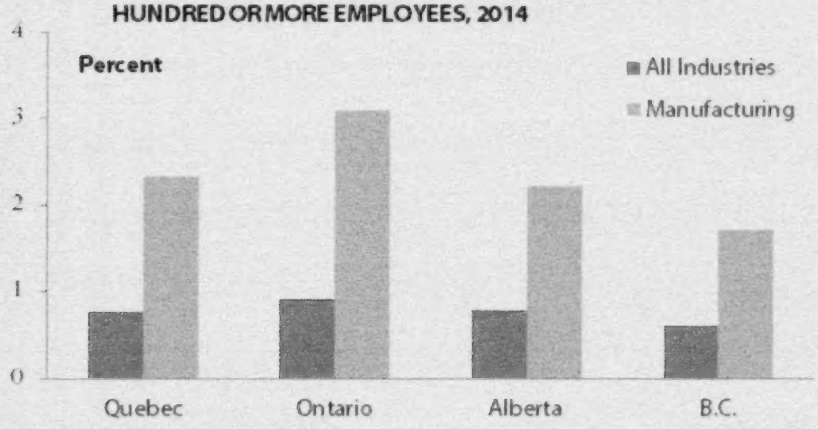
Source: Statistics Canada

3.5.4. B.C. manufacturers tend to employ more workers

In British Columbia, about 1.7% of manufacturing firms employed two hundred or more workers. Within the manufacturing sector, about 2.5% of resource based manufacturing firms employed two hundred or more workers, whereas approximately 1% of non-resource based manufacturing firms employed a similar number of workers. In particular, paper manufacturing was notable, as nearly 29% of all firms within that industry employed two hundred or more workers in 2014.

By comparison, only 0.6% of firms across all sectors in B.C. employed two hundred or more people. However, manufacturing establishments in other major provinces in Canada tend to employ a larger number of people. For example, in Ontario, nearly 3.1% of all manufacturing firms had employed two hundred or more workers in 2014.

FIGURE 32: SHARE (%) OF ESTABLISHMENTS WITH TWO HUNDRED OR MORE EMPLOYEES, 2014



Source: Statistics Canada

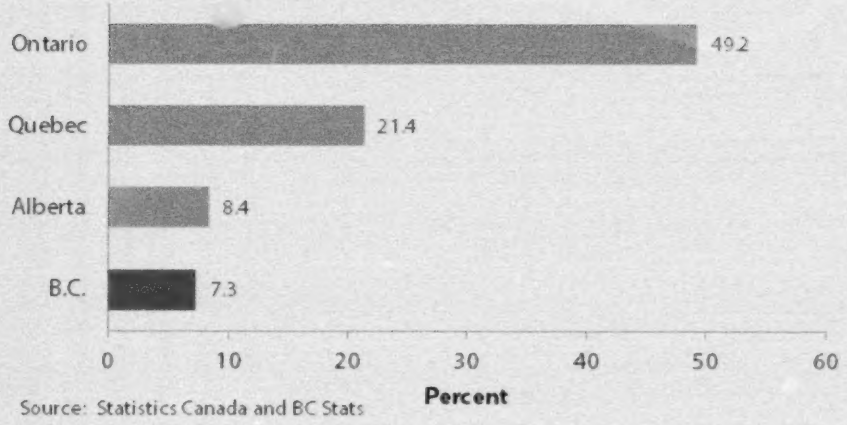
3.6. Exports and Imports

3.6.1. International Trade

3.6.1.1. British Columbia is the fourth largest manufactured goods exporter in Canada

In 2014, the value of British Columbia's manufactured goods exports reached $22.8 billion, accounting for about 7% of all manufactured goods that were exported from Canada to international destinations during that time period. Ontario and Quebec, the two biggest manufacturing provinces in the country, comprised more than 70% of the total export share, while Alberta was responsible for 8% of the total in 2014.

FIGURE 33: PROVINCIAL SHARE (%) OF TOTAL CANADIAN MANUFACTURING EXPORTS, 2014



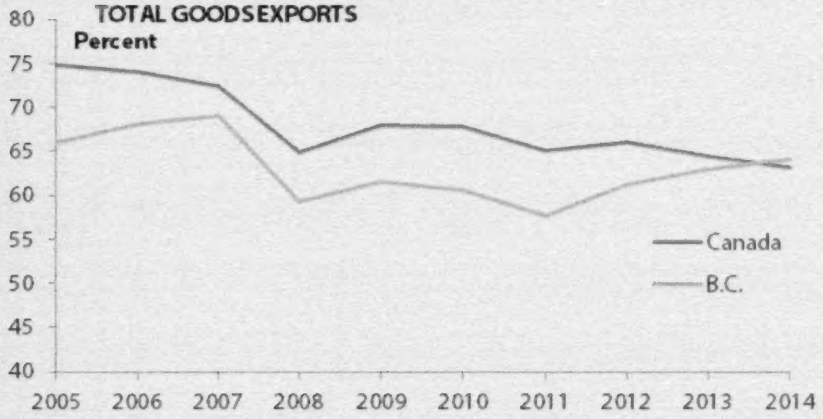
Source: Statistics Canada and BC Stats

3.6.1.2. Manufactured goods constitute a major portion of total exports

In 2014, manufactured goods comprised approximately 64% of B.C.'s total goods[9] exports to international destinations. After reaching a ten-year low of 58% in 2011, the proportion of manufactured goods exports has steadily increased over the past three years. In general, manufacturing exports out of British Columbia have followed a similar trend as other major manufacturing provinces in Canada. However, due to an increase in manufactured goods exports in B.C. over the past few years, British Columbia exported a greater proportion of manufactured goods out of total exports than Canada as a whole.

[9] Service exports not included; in the context of international trade in goods, Statistics Canada and BC Stats utilize the Harmonized Commodity Description and Coding System (HS) as developed by the World Customs Organization.

FIGURE 34: SHARE (%) OF MANUFACTURING EXPORTS OUT OF TOTAL GOODS EXPORTS

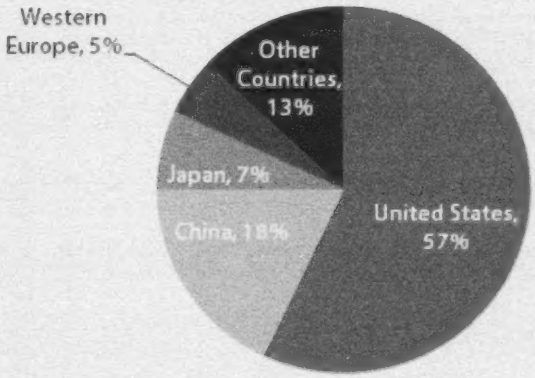


Source: Statistics Canada and BC Stats

3.6.1.3. The United States is the largest export destination

Even though British Columbia's manufactured goods are exported to an increasingly diverse group of trade partners across the globe, the vast majority of products from B.C. are destined for the United States. In 2014, approximately 57% of manufactured goods exports were to the United States. By comparison, about 18% of total manufactured goods exports were to China, the second biggest international export destination for British Columbia manufacturers.

FIGURE 35: B.C. MANUFACTURED GOODS EXPORT DESTINATIONS, 2014

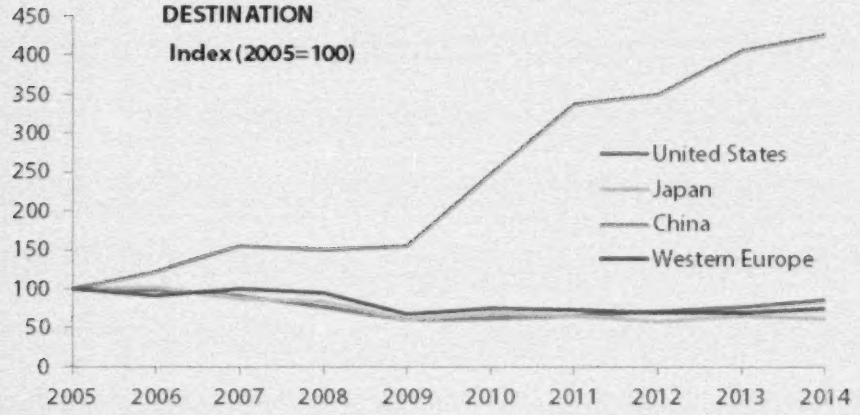


Source: Statistics Canada and BC Stats

3.6.1.4. China has rapidly become a major export destination

Over the past decade, China has become an increasingly important export destination for British Columbia. In 2005, approximately 4% of manufactured goods exported from B.C. were to China. That proportion has increased to about 18% since then, making China the second biggest export destination after the United States. During that time period, exports to other countries have generally decreased, particularly as a result of the 2008-2009 recession in the United States and other advanced economies in the world. Exports to the U.S. have picked up over the past few years on the strength of a generally robust economic recovery, but China continues to become an increasingly significant export destination for B.C.'s manufactured goods.

FIGURE 36: CHANGE IN VALUE OF B.C. EXPORTS, BY DESTINATION



Source: Statistics Canada and BC Stats

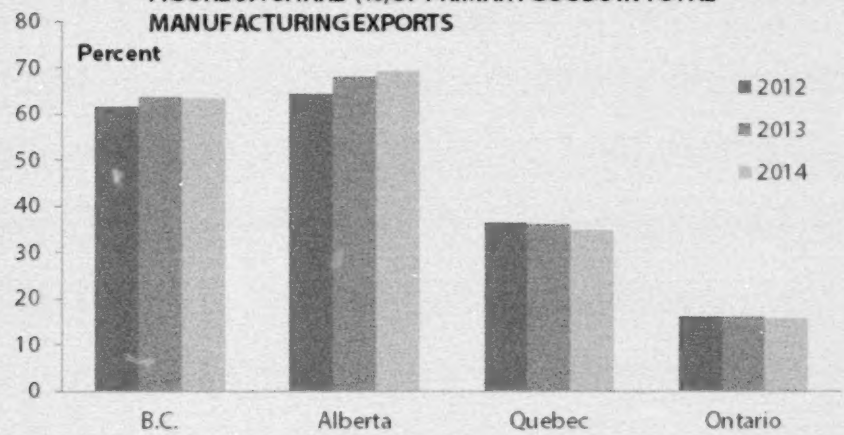
3.6.1.5. Wood and wood products driving the exports growth to China

Even though B.C.'s exports to China have increased across most types of goods, the rapid growth within the past decade is primarily attributable to wood and wood products. In 2014, about 81% of all goods exports to China were within this category; more than ten percentage points higher than a decade prior. Within that time period, the dollar value of wood and wood products being exported to China from B.C. has increased nearly fivefold. Other type of goods being exported to China that have shown similarly robust growth – albeit at much smaller nominal levels – include transportation equipment, prepared foodstuffs, and miscellaneous manufactured goods such as medical devices, electronic equipment and sporting goods.

3.6.1.6. Primary goods form the majority of B.C.'s manufacturing exports

Despite gains made in the 1990's and early 2000's, the proportion of manufactured goods exports that have gone through value added processing in British Columbia has topped out and remained relatively stable since then. As a result, primary goods continue to constitute the majority of manufactured goods exports, underlining the continued importance of natural resources to B.C.'s economy. In 2014, primary goods exports accounted for approximately 64% of B.C.'s total manufactured goods exports. Among the major manufacturing provinces in Canada, Alberta had the highest proportion of primary manufactured goods exports at 69%. By comparison, primary goods accounted for 35% and 16% of total manufacturing exports in Quebec and Ontario respectively. Even though this proportion has remained relatively stable in Ontario, primary goods have comprised an increasing share of Quebec's manufacturing exports over the past decade.

FIGURE 37: SHARE (%)OF PRIMARY GOODS IN TOTAL MANUFACTURING EXPORTS



Source: Statistics Canada and BC Stats

3.6.1.7. Export shipments over water becoming increasingly common

At 51%, road and rail transportation combined to make land transportation the most common method of manufactured goods export shipments from B.C. in 2014. Since the majority of B.C.'s exports are to the United States, the high proportion of exports sent through land transportation methods is in accordance with expectations. However, shipments over water comprised nearly 42% of total shipments, demonstrating the increasing importance of China as a major export destination for British Columbia.

Manufacturing Trade

BC is an open trading economy, with one of five jobs and 20 per cent of our annual economic benefit generated through exports. With a strategic west coast location BC is well positioned to be a North America hub for international trade.

In 2014, BC exports to the EU, China, India, South Korea, and the Trans-Pacific Partnership countries, including Japan, accounted for over 93 per cent of BC's global exports of goods.

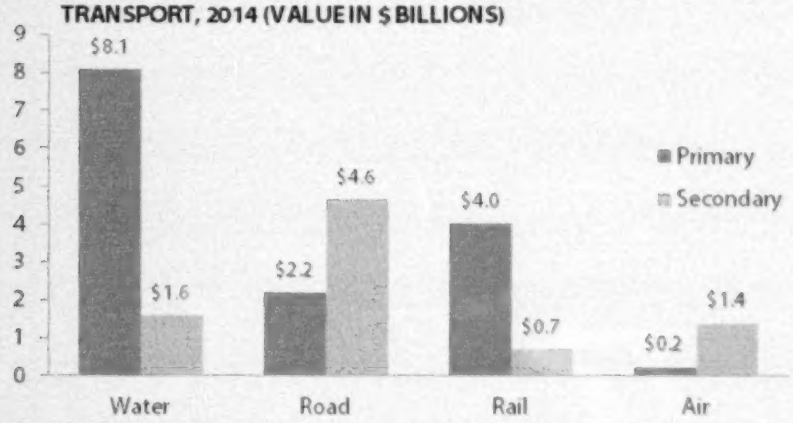
While the US remains BC's top export destination, BC has diversified trade with a number of other countries and trading blocs including China, Japan, South Korea and the European Union.

BC supports Canada in negotiating trade deals, agreements and partnerships to expand and diversify export markets to benefit BC's exporters.

BC has also supported removing barriers to trade, investment and labour mobility within Canada through the New West Partnership Trade Agreement and the renewal of the Agreement on Internal Trade. (Source Ministry of International Trade)

In addition to the eventual destination, any given mode of transportation utilized for manufactured goods exports is strongly associated with the type of good being shipped. Primary manufactured goods mostly travel over water, with rail transportation also being heavily utilized for shipments. On the other hand, most secondary manufactured goods are shipped through roads. In addition, air shipments also appear to be strongly associated with secondary manufactured goods, particularly to export destinations in Europe.

FIGURE 38: MANUFACTURED GOODS EXPORTS BY MODE OF TRANSPORT, 2014 (VALUE IN $ BILLIONS)



Source: Statistics Canada and BC Stats

3.6.1.8. The United States is the largest exporter to B.C.

Despite a slight drop in share of total exports to British Columbia over the past decade, the U.S. remains the largest origin of imported manufactured goods. In 2014, out of nearly $46.2 billion worth of manufactured goods imported by British Columbia, nearly 53% originated from the United States. China and Western Europe, the next two largest exporters to British Columbia, accounted for 15% and 12% of manufactured goods imports respectively.

With the exception of Japan, B.C. has imported increasing amounts of manufactured goods from all of its major trading partners. While China has rapidly become a major exporter to British Columbia, imports of manufactured goods from Mexico have grown at a similar rate. Even though Mexico still accounts for only 5% of total manufactured goods imports, the value of the goods being imported from Mexico has doubled within the past decade. By comparison, the value of goods being imported from Japan has decreased by nearly ten percentage points within that same time period.

FIGURE 39: CHANGE (%) IN VALUE OF B.C. IMPORTS BY ORIGIN

Source: Statistics Canada and BC Stats

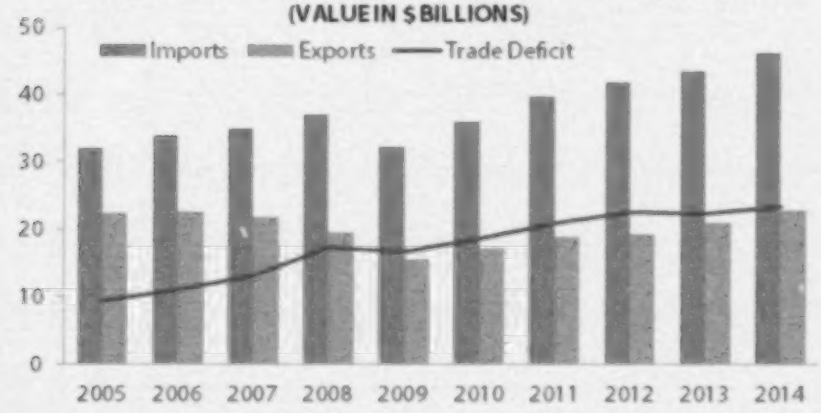
3.6.1.9. Secondary manufactured goods form the vast majority of imports

Unlike British Columbia's export profile, secondary manufactured goods, as opposed to primary manufactured goods, comprise the majority of imports into the province. In 2014, nearly 82% of manufactured goods imports were of secondary goods. Despite an annual drop of nearly five percentage points in 2014, this proportion has remained relatively consistent throughout the past decade and is similar to Canada as a whole.

3.6.1.10. Manufactured goods trade deficit has been getting larger

Even though B.C. has been exporting an increasing amount of manufactured goods over the past several years, the province continues to experience greater trade deficits on a yearly basis as imports of manufactured goods are increasing at a faster pace. Over the past decade, the annual trade deficit in manufactured goods has more than doubled and continues to trend upwards in spite of a steadily depreciating Canadian dollar. As of 2014, B.C.'s annual trade deficit in manufactured goods stands at approximately $23.4 billion.

FIGURE 40: B.C.'S TRADE DEFICIT IN MANUFACTURED GOODS (VALUE IN $ BILLIONS)



Source: Statistics Canada and BC Stats

Among the major trading partners, B.C.'s balance of trade in manufactured goods has worsened the most with the two other North American Free Trade Agreement (NAFTA) member states. Within the past decade, B.C.'s annual manufactured goods trade deficit with the U.S. has quadrupled while the deficit with Mexico has more than doubled. Similarly, B.C.'s trade deficit has increased substantially with Western Europe over the past decade. Despite the rapid growth in exports to China, B.C. has maintained a relatively stable trade deficit in manufactured goods with the East Asian country as imports from China have also increased at a very high pace. British Columbia does have a trade surplus in manufactured goods with Japan, although that position has also deteriorated over the past decade.

3.6.2. Interprovincial Trade

3.6.2.1. Alberta is B.C.'s biggest trade partner within Canada

In addition to foreign countries, B.C. also has strong trade ties with other provinces in Canada. In 2011 – the latest year for which interprovincial manufactured goods trade data is available – B.C. exported nearly $9 billion worth of manufactured goods[10] to the rest of the country, an increase of about 5.5% over 2010. By comparison, B.C. imported nearly $17 billion in manufactured goods during that same time period; an annual increase of approximately 10%. As a share of total interprovincial trade in goods and services, exports of manufactured goods accounted for approximately 24% of the total,

[10] Statistics Canada utilizes the North American Products Classification System (NAPCS) for interprovincial trade in goods and services; only trade in goods mentioned within this document.

while imports in manufactured goods accounted for nearly 37% of all goods and services imported to B.C. from other Canadian provinces in 2011.

Both in terms of exports and imports, Alberta is B.C.'s biggest trading partner of manufactured goods. Ontario, the most populous province in Canada, is the second biggest export destination and import origin. Much like B.C.'s position with the rest of the world, the province maintains a manufactured goods trade deficit with the rest of Canada as a whole.

FIGURE 41: B.C. MANUFACTURED GOODS TRADE, 2011 (VALUE IN $ BILLIONS)

Source: Statistics Canada and BC Stats

3.6.2.2. Food and wood products are the biggest exports

In 2011, the two largest manufactured goods exports from B.C. to rest of Canada were food and wood products, as they accounted for about 31% and 15% of total interprovincial exports respectively. In addition, closely related commodities such as alcoholic beverages, paper and paper products also comprised a large portion of total exports to rest of Canada. Nearly half of wood products exports were to Alberta, while slightly more than half of total food product exports were to Ontario and Quebec.

3.6.2.3. Food and petroleum products are the biggest imports

In 2011, food and refined petroleum products accounted for about 28% and 25% of total manufactured goods imports. Due to B.C.'s close proximity to the globally significant oil producing province of Alberta, more than 80% of refined petroleum product imports came from the neighbouring province in 2011. Other manufactured goods imports such as transportation equipment, chemical products and industrial

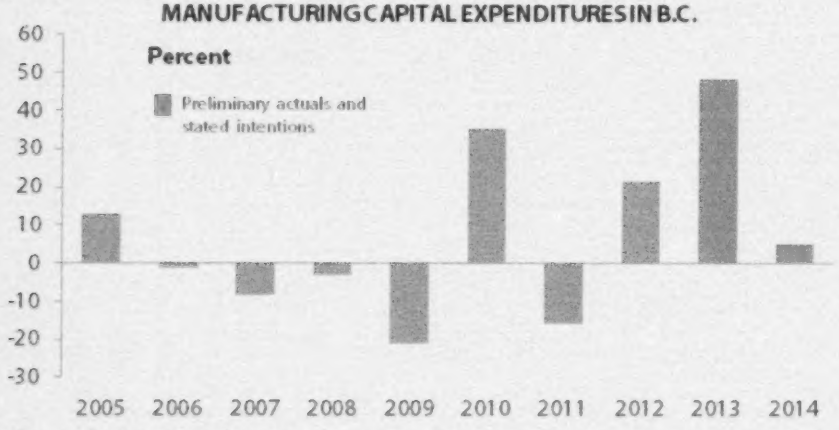
machinery originated primarily from the Canadian manufacturing hubs of Ontario and Quebec.

3.7. Capital Expenditure

3.7.1. Manufacturing investment picking up

Capital expenditures in B.C.'s manufacturing sector are estimated to have been approximately $5 billion over the past couple of years combined. Due to an improving economic outlook in the U.S. and a steady decline in the value of the Canadian dollar, foreign demand for B.C.'s manufactured goods is expected to remain high in the near-term. The growth in capital expenditures is primarily being driven by the wood products manufacturing industry, as a consistent increase in U.S. housing starts is projected to greatly benefit B.C.'s resource-based manufacturers. In addition, firms have had to invest in new processing technologies to accommodate wood impacted by the mountain pine-beetle epidemic in the province. On the other hand, concerns about softening economic growth in China and other major export destinations in Asia have potentially curtailed further business investments.

FIGURE 42: YEAR-OVER-YEAR CHANGE (%) IN MANUFACTURING CAPITAL EXPENDITURES IN B.C.



Source: Statistics Canada

Manufacturing on Demand

With the advent of recent technologies and techniques such as 3D printing, traditional manufacturing is evolving – a manufacturer in 10 to 15 years may no longer be limited to mass production in centralized plants. In some cases, 3D printers are empowering entrepreneurs to design more innovative products at home – not only saving them time and money, but allowing them to better compete with larger companies.

3D printing is a subset of advanced manufacturing technologies that combine new materials, information technologies, and robotics. Also known as "additive manufacturing", 3D products are created by the laying down of successive layers of material in a printer using digital technology.

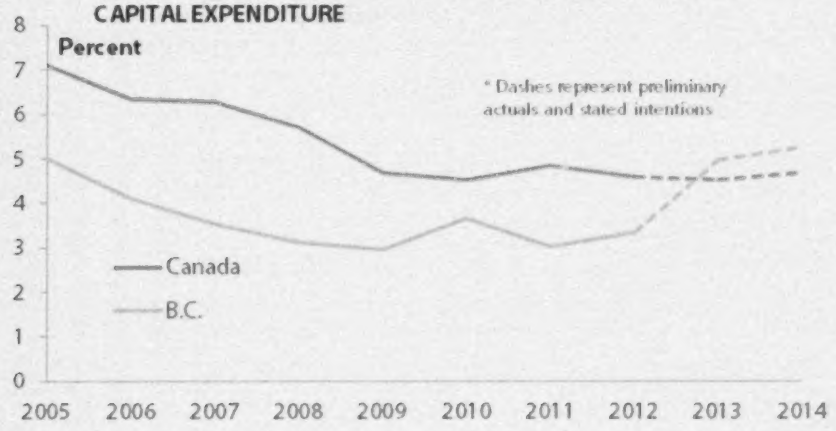
3D printing allows the creation of entirely new designs that would be impossible to produce with conventional manufacturing methods. Parts and prototypes for a wide range of industries such as aerospace, automotive, construction and dentistry are now being printed.

Estimates suggest that the printed part markets will grow from its estimated $U.S. 777 million in 2012 to $U.S. 8.4 billion market in 2025 (a projected 18 percent growth per year), primarily led by metal applications in the automotive, medical, and aerospace industries. (Source: Industry Canada)

3.7.2. Capital expenditure in B.C. stronger than elsewhere in Canada

Since 2012, growth in capital expenditures in B.C.'s manufacturing sector has outpaced other major manufacturing provinces in Canada. In Ontario and Quebec, losses in manufacturing sector capital expenditure have exceeded any annual gains during that time period. Growth in Alberta has been more robust, but still not as strong as the growth in British Columbia. Moreover, as a share of total capital expenditure in the economy, the manufacturing sector has experienced declining investment in Canada as a whole. By comparison, since 2011, the share of manufacturing sector capital expenditure has been steadily increasing in B.C. and is expected to have surpassed the other major manufacturing provinces in the country since 2013.

FIGURE 43: MANUFACTURING SECTOR'S SHARE (%) OF TOTAL CAPITAL EXPENDITURE



Source: Statistics Canada

Conclusion

The manufacturing sector in British Columbia accounts for a large share of the province's total GDP and provides a significant portion of the labour force with well-paying, primarily full-time employment. Even though the manufacturing sector was harder hit by the 2008-2009 recession than the rest of the economy, there has been relatively strong recovery in both output and employment since then.

Nevertheless, similar to other provinces in Canada and many states in northern United States, the slowing growth of wages and employment within the manufacturing sector in B.C. alludes to the pressures exerted upon the labour force by the increasing automation of manufacturing processes and competition from lower cost jurisdictions within North America and around the world.

However, the decreasing dependence of B.C.'s manufacturers on demand from a single country like the United States and the increasing share of exports to high-growth destinations such as China should benefit the manufacturing sector in the province. Moreover, the continued economic recovery in the U.S. and the associated increase in housing starts can provide an additional boon to B.C.'s natural resource driven manufacturing sector over the upcoming years.

A government focus to level playing fields through trade agreements and efforts to diversify market access beyond traditional partners such as the United States and even newer markets such as China, will benefit BC's manufacturing sector. Moreover, the continued economic recovery in the US and the associated increase in housing starts can provide an additional boon to BC's natural resource driven manufacturing sector over the coming years.

4. Detailed Tables

TABLE 4-1 - GDP AT BASIC PRICES (CONSTANT $), MANUFACTURING AND ALL INDUSTRIES, BY SELECTED PROVINCES

	Chained 2007 $ million[1]						
Manufacturing	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**
British Columbia	15,652.7	14,465.1	12,586.0	13,303.4	13,687.3	14,293.9	14,294.9
Alberta	18,446.3	18,164.2	15,383.8	16,244.0	17,845.2	18,294.1	18,669.8
Ontario	88,878.4	81,742.7	67,991.3	72,842.4	74,697.6	76,225.2	75,012.7
Quebec	47,836.4	46,898.5	42,801.4	43,363.5	43,570.8	43,732.8	43,294.2
Canada	186,210.0	176,892.0	153,436.0	160,917.0	165,856.0	168,983.0	168,437.0

All Industries	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**
British Columbia	181,570.7	183,333.5	178,609.6	184,508.8	189,599.1	194,264.7	198,277.7
Alberta	250,108.2	254,059.1	243,266.7	254,935.1	269,673.0	281,107.6	292,589.5
Ontario	557,107.2	556,218.8	538,493.8	556,961.6	570,507.5	579,634.3	586,874.0
Quebec	285,328.7	290,579.9	288,180.0	294,089.6	300,008.2	304,041.0	307,382.9
Canada	1,466,691.0	1,482,081.0	1,438,301.0	1,489,226.0	1,534,440.0	1,565,595.0	1,598,734.0

	% Change from Previous Year						
Manufacturing	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**
British Columbia	-0.4%	-7.6%	-13.0%	5.7%	2.9%	4.4%	0.0%
Alberta	-2.3%	-1.5%	-15.3%	5.6%	9.9%	2.5%	2.1%
Ontario	-5.1%	-8.0%	-16.8%	7.1%	2.5%	2.0%	-1.6%
Quebec	-2.0%	-2.0%	-8.7%	1.3%	0.5%	0.4%	-1.0%
Canada	-2.8%	-5.0%	-13.3%	4.9%	3.1%	1.9%	-0.3%

All Industries	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**
British Columbia	2.7%	1.0%	-2.6%	3.3%	2.8%	2.5%	2.1%
Alberta	2.1%	1.6%	-4.2%	4.8%	5.8%	4.2%	4.1%
Ontario	1.5%	-0.2%	-3.2%	3.4%	2.4%	1.6%	1.2%
Quebec	2.0%	1.8%	-0.8%	2.1%	2.0%	1.3%	1.1%
Canada	2.2%	1.0%	-3.0%	3.5%	3.0%	2.0%	2.1%

1. Note that for chained data, the aggregates are not equal to the sum of their components and, therefore, the sum of the industries will not necessarily equal the "all industries" total.

Source: Statistics Canada

Prepared by: BC Stats on February 6, 2015

TABLE 4-2: GDP AT BASIC PRICES (CONSTANT $), MANUFACTURING, BRITISH COLUMBIA

	Chained 2007 $ million[1]						
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**
Food manufacturing	1,572.8	1,650.5	1,674.4	1,712.5	1,727.7	1,730.1	1,679.9
Beverage and tobacco product manufacturing	615.5	670.9	678.7	643.6	568.1	558.7	580.7
Textile and textile product mills	106.8	98.0	70.8	103.1	x	x	x
Clothing and leather and allied product manufacturing[2]	x	x	x	x	x	x	x
Wood product manufacturing	3,373.5	2,883.9	2,468.2	2,711.7	2,876.5	3,142.0	3,363.8
Paper manufacturing	1,570.6	1,418.9	989.2	1,178.7	1,234.8	1,152.9	1,088.4
Printing and related support activities	479.3	467.2	393.7	365.0	x	x	x
Petroleum and coal product manufacturing	x	x	x	x	256.8	x	x
Chemical manufacturing	x	522.5	488.7	505.6	499.0	581.5	561.1
Plastics and rubber products manufacturing	505.9	482.3	411.5	417.0	470.1	445.9	428.9
Nonxmetallic mineral product manufacturing	787.5	711.4	548.9	546.8	559.3	x	x
Primary metal manufacturing	1,069.6	978.2	872.1	876.3	873.5	933.6	921.3
Fabricated metal product manufacturing	x	909.1	756.2	761.4	872.9	910.3	914.4
Machinery manufacturing	1,052.4	882.9	692.6	755.5	863.6	913.8	878.9
Computer and electronic product manufacturing	630.9	684.7	596.5	714.7	711.2	x	x
Electrical equipment, appliance and component manufacturing	x	212.7	206.8	271.8	282.1	306.6	341.9
Transportation equipment manufacturing	621.6	572.0	423.1	481.9	561.1	779.1	759.2
Furniture and related product manufacturing	461.7	445.4	389.4	384.6	353.8	361.5	352.2
Miscellaneous manufacturing	539.6	440.1	435.8	447.8	x	456.8	485.9
Total Manufacturing	**15,652.7**	**14,465.1**	**12,586.0**	**13,303.4**	**13,687.3**	**14,293.9**	**14,294.9**

	% Change from Previous Year						
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**
Food manufacturing	1.3%	4.9%	1.4%	2.3%	0.9%	0.1%	-2.9%
Beverage and tobacco product manufacturing	-	9.0%	1.2%	-5.2%	-11.7%	-1.7%	3.9%
Textile and textile product mills	-2.9%	-8.2%	-27.8%	45.6%	-	-	-
Clothing and leather and allied product manufacturing[2]	-	-	-	-	-	-	-
Wood product manufacturing	-6.6%	-14.5%	-14.4%	9.9%	6.1%	9.2%	7.1%
Paper manufacturing	2.4%	-9.7%	-30.3%	19.2%	4.8%	-6.6%	-5.6%
Printing and related support activities	-9.6%	-2.5%	-15.7%	-7.3%	-	-	-
Petroleum and coal product manufacturing	-	-	-	-	-	-	-
Chemical manufacturing	-	-	-6.5%	3.5%	-1.3%	16.5%	-3.5%
Plastics and rubber products manufacturing	-	-4.7%	-14.7%	1.3%	12.7%	-5.1%	-3.8%
Non-metallic mineral product manufacturing	21.3%	-9.7%	-22.8%	-0.4%	2.3%	-	-
Primary metal manufacturing	2.7%	-8.5%	-10.8%	0.5%	-0.3%	6.9%	-1.3%
Fabricated metal product manufacturing	-	-	-16.8%	0.7%	14.6%	4.3%	0.5%
Machinery manufacturing	-5.4%	-16.1%	-21.6%	9.1%	14.3%	5.8%	-3.8%
Computer and electronic product manufacturing	-10.0%	8.5%	-12.9%	19.8%	-0.5%	-	-
Electrical equipment, appliance and component manufacturing	-	-	-2.8%	31.4%	3.8%	8.7%	11.5%
Transportation equipment manufacturing	-	-8.0%	-26.0%	13.9%	16.4%	38.9%	-2.6%
Furniture and related product manufacturing	-	-3.5%	-12.6%	-1.2%	-8.0%	2.2%	-2.6%
Miscellaneous manufacturing	-2.5%	-18.4%	-1.0%	2.8%	-	-	6.4%
Total Manufacturing	**-0.4%**	**-7.6%**	**-13.0%**	**5.7%**	**2.9%**	**4.4%**	**0.0%**

1. Note that for chained data, the aggregates are not equal to the sum of their components and, therefore, the sum of the industries will not necessarily equal the "all industries" total.

2. Data not available for the time period prior to 2007

x denotes data suppressed due to confidentiality requirements

Source: Statistics Canada

Prepared by BC Stats on February 6, 2015

TABLE 4-3: GDP AT BASIC PRICES (CURRENT $), MANUFACTURING AND ALL INDUSTRIES, BY SELECTED PROVINCES

			$ million		
Manufacturing	**2007**	**2008**	**2009**	**2010**	**2011**
British Columbia	15,652.7	14,456.0	12,333.6	13,080.3	13,717.7
Alberta	18,446.3	18,396.2	15,813.8	18,348.7	22,408.5
Ontario	88,878.4	79,611.2	71,167.9	75,434.0	77,225.6
Quebec	47,836.4	46,110.7	43,136.4	44,620.1	45,917.2
Canada	186,209.6	174,933.0	158,136.3	166,968.7	176,232.0

	% of Canadian Total Manufacturing GDP				
	2007	**2008**	**2009**	**2010**	**2011**
British Columbia	8%	8%	8%	8%	8%
Alberta	10%	11%	10%	11%	13%
Ontario	48%	46%	45%	45%	44%
Quebec	26%	26%	27%	27%	26%
Canada	100%	100%	100%	100%	100%

			$ million		
All Industries	**2007**	**2008**	**2009**	**2010**	**2011**
British Columbia	181,570.7	189,418.1	181,675.3	191,089.5	201,922.0
Alberta	250,108.2	287,048.2	238,704.1	261,657.3	290,122.2
Ontario	557,107.2	566,375.2	557,099.7	589,162.7	617,757.8
Quebec	285,328.7	293,766.9	296,316.5	309,059.0	322,992.7
Canada	1,466,691.4	1,551,683.8	1,473,183.0	1,564,105.4	1,667,007.0

	% of Provincial Total GDP				
	2007	**2008**	**2009**	**2010**	**2011**
British Columbia	9%	8%	7%	7%	7%
Alberta	7%	6%	7%	7%	8%
Ontario	16%	14%	13%	13%	13%
Quebec	17%	16%	15%	14%	14%
Canada	13%	11%	11%	11%	11%

		% Change from Previous Year			
Manufacturing	**2007**[1]	**2008**	**2009**	**2010**	**2011**
British Columbia	-	-7.6%	-14.7%	6.1%	4.9%
Alberta	-	-0.3%	-14.0%	16.0%	22.1%
Ontario	-	-10.4%	-10.6%	6.0%	2.4%
Quebec	-	-3.6%	-6.5%	3.4%	2.9%
Canada	-	-6.1%	-9.6%	5.6%	5.5%

		% Change from Previous Year			
All Industries	**2007**[1]	**2008**	**2009**	**2010**	**2011**
British Columbia	-	4.3%	-4.1%	5.2%	5.7%
Alberta	-	14.8%	-16.8%	9.6%	10.9%
Ontario	-	1.7%	-1.6%	5.8%	4.9%
Quebec	-	3.0%	0.9%	4.3%	4.5%
Canada	-	5.8%	-5.1%	6.2%	6.6%

1. Note that data prior to 2007 are inconsistent with data for 2007 onward. Statistics Canada introduced changes to the concepts used in the System of National Accounts and has not yet released revised current dollar figures for years before 2007. Therefore the % change from the previous year was not calculated for 2007.

Source: Statistics Canada
Prepared by: BC Stats on February 6, 2015

TABLE 4-4: GDP AT BASIC PRICES (CURRENT $), MANUFACTURING, BRITISH COLUMBIA

	$ million				
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**
Food manufacturing	1,572.8	1,671.0	1,822.9	1,832.0	1,880.0
Beverage and tobacco product manufacturing	615.5	694.9	698.4	634.8	612.4
Textile and textile product mills	106.8	98.5	57.2	81.5	x
Clothing and leather and allied product manufacturing	x	x	x	x	x
Wood product manufacturing	3,373.5	2,462.4	1,808.4	2,239.7	2,138.0
Paper manufacturing	1,570.6	1,307.0	1,281.6	1,335.5	1,535.1
Printing and related support activities	479.3	456.6	390.0	357.0	x
Petroleum and coal product manufacturing	x	x	x	x	210.9
Chemical manufacturing	x	600.7	541.2	536.5	581.4
Plastics and rubber products manufacturing	505.9	492.4	421.1	408.5	470.8
Non-metallic mineral product manufacturing	787.5	735.4	639.7	654.2	660.2
Primary metal manufacturing	1,069.6	1,112.4	735.1	819.4	973.7
Fabricated metal product manufacturing	x	940.6	792.2	768.6	913.8
Machinery manufacturing	1,052.4	881.5	655.8	730.2	842.2
Computer and electronic product manufacturing	630.9	576.6	520.2	619.1	618.1
Electrical equipment, appliance and component manufacturing	x	221.8	216.2	256.9	281.4
Transportation equipment manufacturing	621.6	593.7	425.8	422.0	619.0
Furniture and related product manufacturing	461.7	453.1	390.9	378.1	366.1
Miscellaneous manufacturing	539.6	464.3	458.5	464.4	x
Total Manufacturing	**15,652.7**	**14,456.0**	**12,333.6**	**13,080.3**	**13,717.7**

	% Change from Previous Year				
NAICS Industry	**2007**[1]	**2008**	**2009**	**2010**	**2011**
Food manufacturing	-	6.2%	9.1%	0.5%	2.6%
Beverage and tobacco product manufacturing	-	12.9%	0.5%	-9.1%	-3.5%
Textile and textile product mills	-	-7.8%	-41.9%	42.5%	-
Clothing and leather and allied product manufacturing	-	-	-	-	-
Wood product manufacturing	-	-27.0%	-26.6%	23.8%	-4.5%
Paper manufacturing	-	-16.8%	-1.9%	4.2%	14.9%
Printing and related support activities	-	-4.7%	-14.6%	-8.5%	-
Petroleum and coal product manufacturing	-	-	-	-	-
Chemical manufacturing	-	-	-9.9%	-0.9%	8.4%
Plastics and rubber products manufacturing	-	-2.7%	-14.5%	-3.0%	15.3%
Non-metallic mineral product manufacturing	-	-6.6%	-13.0%	2.3%	0.9%
Primary metal manufacturing	-	4.0%	-33.9%	11.5%	18.8%
Fabricated metal product manufacturing	-	-	-15.8%	-3.0%	18.9%
Machinery manufacturing	-	-16.2%	-25.6%	11.3%	15.3%
Computer and electronic product manufacturing	-	-8.6%	-9.8%	19.0%	-0.2%
Electrical equipment, appliance and component manufacturing	-	-	-2.5%	18.8%	9.5%
Transportation equipment manufacturing	-	-4.5%	-28.3%	-0.9%	46.7%
Furniture and related product manufacturing	-	-1.9%	-13.7%	-3.3%	-3.2%
Miscellaneous manufacturing	-	-14.0%	-1.2%	1.3%	-
Total Manufacturing	**-**	**-7.6%**	**-14.7%**	**6.1%**	**4.9%**

1. Note that data prior to 2007 are inconsistent with data for 2007 onward. Therefore the % change from the previous year was not calculated for 2007

x denotes data suppressed due to confidentiality requirements

Source: Statistics Canada

Prepared by: BC Stats on February 6, 2015

TABLE 4-5: VALUE OF MANUFACTURING SHIPMENTS, BY PROVINCE

	$ million							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia								
Total Manufacturing	42,418.5	39,434.6	32,964.3	35,702.3	38,226.1	38,913.8	40,117.7	42,784.7
Non-Durables	18,649.2	18,049.9	17,128.7	18,121.2	18,979.5	18,671.1	18,380.2	20,130.9
Durables	23,769.2	21,384.7	15,835.6	17,581.1	19,246.7	20,242.7	21,737.5	22,653.8
Alberta								
Total Manufacturing	65,730.6	70,146.2	54,252.7	60,112.4	69,855.3	71,675.4	73,793.2	79,447.0
Non-Durables	43,090.7	47,000.8	37,490.6	41,581.1	47,795.1	47,483.2	49,672.6	54,052.0
Durables	22,639.8	23,145.4	16,762.1	18,531.3	22,060.2	24,192.2	24,120.6	25,395.0
Ontario								
Total Manufacturing	286,987.8	269,383.7	218,784.6	242,057.4	256,493.5	270,412.0	270,514.7	286,562.3
Non-Durables	101,679.9	105,736.8	93,796.9	99,943.6	104,997.2	107,921.5	110,803.6	115,665.4
Durables	185,308.0	163,646.9	124,987.7	142,113.8	151,496.3	162,490.5	159,711.1	170,896.9
Quebec								
Total Manufacturing	143,893.9	147,002.9	127,046.9	132,605.1	139,273.2	139,129.7	137,279.5	146,177.0
Non-Durables	67,800.5	70,102.9	65,137.1	67,627.7	68,780.3	69,943.4	66,850.8	71,852.6
Durables	76,093.4	76,899.0	61,909.8	64,977.4	70,492.9	69,186.3	70,428.7	74,324.4
Canada								
Total Manufacturing	597,673.1	591,969.7	488,075.7	529,071.4	569,155.7	588,536.1	590,400.8	621,687.0
Non-Durables	270,865.5	287,358.7	251,304.3	268,022.4	286,803.2	292,358.9	293,922.5	306,835.6
Durables	326,807.6	304,611.0	236,771.4	261,049.1	282,352.5	296,177.1	296,478.3	314,851.4

	% Change from Previous Year							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia								
Total Manufacturing	-4.6%	-7.0%	-16.4%	8.3%	7.1%	1.8%	3.1%	6.6%
Non-Durables	1.3%	-3.2%	-5.1%	5.8%	4.7%	-1.6%	-1.6%	9.5%
Durables	-8.9%	-10.0%	-25.9%	11.0%	9.5%	5.2%	7.4%	4.2%
Alberta								
Total Manufacturing	1.0%	6.7%	-22.7%	10.8%	16.2%	2.6%	3.0%	7.7%
Non-Durables	2.5%	9.1%	-20.2%	10.9%	14.9%	-0.7%	4.6%	8.8%
Durables	-1.7%	2.2%	-27.6%	10.6%	19.0%	9.7%	-0.3%	5.3%
Ontario								
Total Manufacturing	-2.9%	-6.1%	-18.8%	10.6%	6.0%	5.4%	0.0%	5.9%
Non-Durables	-4.3%	4.0%	-11.3%	6.6%	5.1%	2.8%	2.7%	4.4%
Durables	-2.1%	-11.7%	-23.6%	13.7%	6.6%	7.3%	-1.7%	7.0%
Quebec								
Total Manufacturing	-1.2%	2.2%	-13.6%	4.4%	5.0%	-0.1%	-1.3%	6.5%
Non-Durables	-2.4%	3.4%	-7.1%	3.8%	1.7%	1.7%	-4.4%	7.5%
Durables	0.0%	1.1%	-19.5%	5.0%	8.5%	-1.9%	1.8%	5.5%
Canada								
Total Manufacturing	-1.3%	-1.0%	-17.6%	8.4%	7.6%	3.4%	0.3%	5.3%
Non-Durables	-0.7%	6.1%	-12.5%	6.7%	7.0%	1.9%	0.5%	4.4%
Durables	-1.8%	-6.8%	-22.3%	10.3%	8.2%	4.9%	0.1%	6.2%

Source: Statistics Canada
Prepared by: BC Stats on February 17, 2015

TABLE 4-6: VALUE OF MANUFACTURING SHIPMENTS, BRITISH COLUMBIA

	$ million							
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Non-Durable Goods	**18,649.2**	**18,049.9**	**17,128.7**	**18,121.2**	**18,979.5**	**18,671.1**	**18,380.2**	**20,130.9**
Food	5,469.3	5,494.3	6,029.7	6,180.9	6,509.8	6,730.9	6,759.4	7,203.0
Beverages and Tobacco	1,204.2	1,215.4	1,220.2	1,155.2	1,124.7	x	x	x
Textile Mills	x	x	x	x	x	x	x	x
Textile Product Mills	x	x	x	x	199.9	x	x	x
Clothing	x	x	x	x	x	x	x	x
Leather and Allied Products	36.2	18.6	13.2	x	x	x	9.4	x
Paper	5,829.2	5,378.3	4,379.5	4,933.5	5,070.6	4,418.6	4,114.1	4,478.4
Printing and Related	889.3	805.4	629.4	628.7	x	x	672.4	x
Petroleum and Coal	x	x	x	x	x	x	x	x
Chemicals	x	x	x	x	x	x	1,524.6	x
Plastics and Rubber Products	1,325.7	1,123.8	993.3	1,096.1	1,170.4	x	1,144.4	x
Durable Goods	**23,769.2**	**21,384.7**	**15,835.6**	**17,581.1**	**19,246.7**	**20,242.7**	**21,737.5**	**22,653.8**
Wood Products	8,120.5	6,824.2	4,848.0	5,720.7	6,101.8	6,599.7	8,092.3	8,410.0
Non-Metallic Mineral Products	1,995.2	1,830.6	1,336.8	1,314.3	1,375.8	x	1,280.9	1,327.6
Primary Metal	3,011.6	2,615.4	1,922.7	2,241.6	2,687.8	2,559.7	2,480.9	2,364.2
Fabricated Metal Products	x	x	x	x	2,032.3	2,177.7	2,220.3	2,242.4
Machinery	2,228.0	1,978.0	1,499.8	1,687.0	2,015.8	2,233.8	2,238.0	2,488.9
Computers and Electronic Products	1,472.9	1,413.9	1,153.1	1,149.7	1,068.4	982.1	1,137.4	1,255.7
Electrical Equipment, Appliances & Components	x	x	x	x	x	x	811.5	746.6
Transportation Equipment	1,674.9	1,398.3	1,036.2	1,168.4	1,459.6	1,694.8	1,575.5	1,802.0
Furniture and Related Products	1,069.1	1,062.3	878.8	839.3	817.7	823.9	805.2	829.7
Miscellaneous Manufacturing	1,078.5	1,177.7	899.0	986.6	x	x	1,095.4	1,186.8
Total Manufacturing	**42,418.5**	**39,434.6**	**32,964.3**	**35,702.3**	**38,226.1**	**38,913.8**	**40,117.7**	**42,784.7**

	% Change from Previous Year							
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Non-Durable Goods	**1.3%**	**-3.2%**	**-5.1%**	**5.8%**	**4.7%**	**-1.6%**	**-1.6%**	**9.5%**
Food	-0.7%	0.5%	9.7%	2.5%	5.3%	3.4%	0.4%	6.6%
Beverages and Tobacco	2.1%	0.9%	0.4%	-5.3%	-2.6%	-	-	-
Textile Mills	-	-	-	-	-	-	-	-
Textile Product Mills	-	-	-	-	-	-	-	-
Clothing	-	-	-	-	-	-	-	-
Leather and Allied Products	50.9%	-48.6%	-29.2%	-	-	-	-	-
Paper	4.9%	-7.7%	-18.6%	12.7%	2.8%	-12.9%	-6.9%	8.9%
Printing and Related	-10.2%	-9.4%	-21.9%	-0.1%	-	-	-	-
Petroleum and Coal	-	-	-	-	-	-	-	-
Chemicals	-	-	-	-	-	-	-	-
Plastics and Rubber Products	-3.1%	-15.2%	-11.6%	10.4%	6.8%	-	-	-
Durable Goods	**-8.9%**	**-10.0%**	**-25.9%**	**11.0%**	**9.5%**	**5.2%**	**7.4%**	**4.2%**
Wood Products	-24.1%	-16.0%	-29.0%	18.0%	6.7%	8.2%	22.6%	3.9%
Non-Metallic Mineral Products	0.3%	-8.2%	-27.0%	-1.7%	4.7%	-	-	3.6%
Primary Metal	-2.1%	-13.2%	-26.5%	16.6%	19.9%	-4.8%	-3.1%	-4.7%
Fabricated Metal Products	-	-	-	-	-	7.2%	2.0%	1.0%
Machinery	-6.7%	-11.2%	-24.2%	12.5%	19.5%	10.8%	0.2%	11.2%
Computers and Electronic Products	-8.7%	-4.0%	-18.4%	-0.3%	-7.1%	-8.1%	15.8%	10.4%
Electrical Equipment, Appliances & Components	-	-	-	-	-	-	-	-8.0%
Transportation Equipment	11.9%	-16.5%	-25.9%	12.8%	24.9%	16.1%	-7.0%	14.4%
Furniture and Related Products	-8.1%	-0.6%	-17.3%	-4.5%	-2.6%	0.8%	-2.3%	3.0%
Miscellaneous Manufacturing	16.4%	9.2%	-23.7%	9.7%	-	-	-	8.3%
Total Manufacturing	**-4.6%**	**-7.0%**	**-16.4%**	**8.3%**	**7.1%**	**1.8%**	**3.1%**	**6.6%**

x Suppressed to meet the confidentiality requirements of the Statistics Act

Source: Statistics Canada

Prepared by: BC Stats on February 17, 2015

TABLE 4-7: TOTAL EMPLOYMENT, MANUFACTURING, BY PROVINCE

	Thousands							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia								
Manufacturing	197.4	177.9	154.5	154.6	156.8	164.8	151.7	161.4
Non-Durables	71.5	69.2	61.5	56.0	60.5	65.1	60.8	64.9
Durables	126.0	108.7	93.0	98.7	96.4	99.6	90.9	96.5
All Industries	2,206.0	2,241.9	2,191.9	2,223.0	2,227.8	2,262.5	2,265.6	2,278.4
Goods	480.6	486.1	441.4	436.6	431.7	441.4	442.1	449.9
Services	1,725.4	1,755.8	1,750.6	1,786.5	1,796.1	1,821.0	1,823.5	1,828.5
Alberta								
Manufacturing	144.4	140.3	123.4	125.2	133.7	137.6	142.7	144.5
Non-Durables	57.2	53.9	50.8	51.6	51.1	49.4	59.1	57.2
Durables	87.2	86.3	72.6	73.5	82.6	88.1	83.6	87.3
All Industries	1,991.0	2,053.9	2,029.7	2,023.7	2,099.5	2,172.5	2,226.2	2,274.6
Goods	567.9	585.6	540.4	534.1	574.3	622.8	642.1	658.2
Services	1,423.1	1,468.2	1,489.3	1,489.5	1,525.2	1,549.7	1,584.1	1,616.4
Ontario								
Manufacturing	939.1	883.2	773.6	763.5	772.9	779.2	767.0	748.6
Non-Durables	333.6	326.8	297.9	296.6	292.7	277.5	277.5	271.6
Durables	605.5	556.3	475.6	466.9	480.2	501.6	489.5	477.0
All Industries	6,545.5	6,610.3	6,432.7	6,537.8	6,658.4	6,702.6	6,823.4	6,877.9
Goods	1,534.1	1,502.0	1,365.0	1,380.6	1,408.7	1,415.3	1,397.5	1,382.0
Services	5,011.4	5,108.3	5,067.7	5,157.3	5,249.7	5,287.3	5,425.9	5,495.9
Quebec								
Manufacturing	544.1	533.3	518.5	500.5	491.2	497.2	494.2	489.8
Non-Durables	242.6	233.9	233.8	227.7	221.7	217.6	216.8	209.5
Durables	301.5	299.4	284.6	272.8	269.5	279.6	277.4	280.2
All Industries	3,839.2	3,882.7	3,854.2	3,937.9	3,975.6	4,005.9	4,060.8	4,059.7
Goods	874.4	880.1	861.2	856.8	865.6	870.2	885.6	862.8
Services	2,964.8	3,002.6	2,993.0	3,081.1	3,109.9	3,135.7	3,175.2	3,196.9
Canada								
Manufacturing	2,026.0	1,927.2	1,745.1	1,710.7	1,721.8	1,746.5	1,723.1	1,711.0
Non-Durables	808.9	781.7	729.8	713.5	706.1	689.5	693.8	681.5
Durables	1,217.2	1,145.5	1,015.2	997.2	1,015.7	1,056.9	1,029.3	1,029.5
All Industries	16,769.3	17,010.2	16,727.6	16,964.3	17,221.0	17,438.0	17,691.1	17,802.2
Goods	3,968.8	3,980.5	3,720.1	3,725.0	3,801.3	3,873.9	3,910.1	3,897.1
Services	12,800.5	13,029.7	13,007.5	13,239.2	13,419.8	13,564.1	13,781.0	13,905.1

Source: Statistics Canada
Prepared by: BC Stats on February 17, 2015

TABLE 4-8: TOTAL EMPLOYMENT, MANUFACTURING, BY PROVINCE (% CHANGE FROM PREVIOUS YEAR)

	% Change from Previous Year							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia								
Manufacturing	3.2%	-9.9%	-13.2%	0.1%	1.4%	5.1%	-7.9%	6.4%
Non-Durables	7.4%	-3.2%	-11.1%	-8.9%	8.0%	7.6%	-6.6%	6.7%
Durables	1.0%	-13.7%	-14.4%	6.1%	-2.3%	3.3%	-8.7%	6.2%
All Industries	3.0%	1.6%	-2.2%	1.4%	0.2%	1.6%	0.1%	0.6%
Goods	6.2%	1.1%	-9.2%	-1.1%	-1.1%	2.2%	0.2%	1.8%
Services	2.2%	1.8%	-0.3%	2.1%	0.5%	1.4%	0.1%	0.3%
Alberta								
Manufacturing	2.5%	-2.8%	-12.0%	1.5%	6.8%	2.9%	3.7%	1.3%
Non-Durables	-1.2%	-5.8%	-5.8%	1.6%	-1.0%	-3.3%	19.6%	-3.2%
Durables	5.1%	-1.0%	-15.9%	1.2%	12.4%	6.7%	-5.1%	4.4%
All Industries	4.2%	3.2%	-1.2%	-0.3%	3.7%	3.5%	2.5%	2.2%
Goods	6.7%	3.1%	-7.7%	-1.2%	7.5%	8.4%	3.1%	2.5%
Services	3.2%	3.2%	1.4%	0.0%	2.4%	1.6%	2.2%	2.0%
Ontario								
Manufacturing	-5.8%	-6.0%	-12.4%	-1.3%	1.2%	0.8%	-1.6%	-2.4%
Non-Durables	-3.4%	-2.0%	-8.8%	-0.4%	-1.3%	-5.2%	0.0%	-2.1%
Durables	-7.1%	-8.1%	-14.5%	-1.8%	2.8%	4.5%	-2.4%	-2.6%
All Industries	1.4%	1.0%	-2.7%	1.6%	1.8%	0.7%	1.8%	0.8%
Goods	-3.3%	-2.1%	-9.1%	1.1%	2.0%	0.5%	-1.3%	-1.1%
Services	3.0%	1.9%	-0.8%	1.8%	1.8%	0.7%	2.6%	1.3%
Quebec								
Manufacturing	-6.2%	-2.0%	-2.8%	-3.5%	-1.9%	1.2%	-0.6%	-0.9%
Non-Durables	-3.4%	-3.6%	0.0%	-2.6%	-2.6%	-1.8%	-0.4%	-3.4%
Durables	-8.3%	-0.7%	-4.9%	-4.1%	-1.2%	3.7%	-0.8%	1.0%
All Industries	2.6%	1.1%	-0.7%	2.2%	1.0%	0.8%	1.4%	0.0%
Goods	-2.9%	0.7%	-2.1%	-0.5%	1.0%	0.5%	1.8%	-2.6%
Services	4.3%	1.3%	-0.3%	2.9%	0.9%	0.8%	1.3%	0.7%
Canada								
Manufacturing	-3.6%	-4.9%	-9.4%	-2.0%	0.6%	1.4%	-1.3%	-0.7%
Non-Durables	-1.3%	-3.4%	-6.6%	-2.2%	-1.0%	-2.4%	0.6%	-1.8%
Durables	-5.1%	-5.9%	-11.4%	-1.8%	1.9%	4.1%	-2.6%	0.0%
All Industries	2.3%	1.4%	-1.7%	1.4%	1.5%	1.3%	1.5%	0.6%
Goods	-0.1%	0.3%	-6.5%	0.1%	2.0%	1.9%	0.9%	-0.3%
Services	3.0%	1.8%	-0.2%	1.8%	1.4%	1.1%	1.6%	0.9%

Source: Statistics Canada
Prepared by: BC Stats on February 17, 2015

TABLE 4-9: TOTAL EMPLOYMENT, MANUFACTURING, BRITISH COLUMBIA

	Thousands							
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Non-durables	**71.5**	**69.2**	**61.5**	**56.0**	**60.5**	**65.1**	**60.8**	**64.9**
Food Manufacturing	22.0	23.3	23.5	20.6	22.6	24.6	21.9	21.9
Beverage and Tobacco Product Manufacturing	5.2	5.7	3.8	4.3	6.1	4.4	4.8	6.2
Textile Mills & Textile Product Mills	1.6	x	x	2.1	2.2	x	x	2.6
Clothing Manufacturing & Leather & Allied Pro	6.9	5.4	3.6	3.2	4.4	3.6	3.1	4.2
Paper Manufacturing	14.9	12.9	10.3	9.4	8.7	11.4	10.5	12.2
Printing and Related Support Activities	6.0	8.3	7.2	6.0	7.3	7.9	6.5	5.5
Petroleum and Coal Products Manufacturing	x	x	x	1.8	x	x	x	x
Chemical Manufacturing	5.5	6.7	5.3	4.8	4.4	6.5	6.5	7.1
Plastics and Rubber Products Manufacturing	8.7	4.6	5.8	3.8	4.1	4.5	6.4	4.3
Durables	**126.0**	**108.7**	**93.0**	**98.7**	**96.4**	**99.6**	**90.9**	**96.5**
Wood Product Manufacturing	43.3	32.9	26.3	26.7	29.4	25.2	26.4	29.3
Non-Metallic Mineral Product Manufacturing	8.1	7.3	7.0	6.7	6.8	5.8	4.6	5.1
Primary Metal Manufacturing	5.8	4.9	5.1	6.7	5.8	5.5	5.0	2.3
Fabricated Metal Product Manufacturing	15.1	15.7	11.8	12.2	11.2	13.8	11.1	12.3
Machinery Manufacturing	8.6	5.8	6.3	7.0	9.0	9.7	9.4	8.6
Computer and Electronic Product Manufacturi	7.0	6.3	4.4	6.9	6.2	7.0	6.2	8.0
Electrical Equipment, Appliance and Compone	2.6	4.2	1.6	2.4	1.7	3.9	2.9	3.8
Transportation Equipment Manufacturing	12.0	9.3	9.6	8.6	8.8	10.9	8.5	9.6
Furniture and Related Product Manufacturing	10.8	10.0	10.1	9.0	6.5	7.9	6.9	7.6
Miscellaneous Manufacturing	12.7	12.3	10.8	12.5	11.0	9.9	9.8	10.0
Total Manufacturing	**197.4**	**177.9**	**154.5**	**154.6**	**156.8**	**164.8**	**151.7**	**161.4**

	% Change from Previous Year							
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Non-Durable Goods	**7.4%**	**-3.2%**	**-11.1%**	**-8.9%**	**8.0%**	**7.6%**	**-6.6%**	**6.7%**
Food	17.0%	5.9%	0.9%	-12.3%	9.7%	8.8%	-11.0%	0.0%
Beverages and Tobacco	10.6%	9.6%	-33.3%	13.2%	41.9%	-27.9%	9.1%	29.2%
Textile Mills and Textile Product Mills	-	-	-	-	4.8%	-	-	-
Clothing and Leather and Allied Products	15.0%	-21.7%	-33.3%	-11.1%	37.5%	-18.2%	-13.9%	35.5%
Paper	1.4%	-13.4%	-20.2%	-8.7%	-7.4%	31.0%	-7.9%	16.2%
Printing and Related	-24.1%	38.3%	-13.3%	-16.7%	21.7%	8.2%	-17.7%	-15.4%
Petroleum and Coal	-	-	-	-	-	-	-	-
Chemicals	-5.2%	21.8%	-20.9%	-9.4%	-8.3%	47.7%	0.0%	9.2%
Plastics and Rubber Products	19.2%	-47.1%	26.1%	-34.5%	7.9%	9.8%	42.2%	-32.8%
Durable Goods	**1.0%**	**-13.7%**	**-14.4%**	**6.1%**	**-2.3%**	**3.3%**	**-8.7%**	**6.2%**
Wood Products	0.0%	-24.0%	-20.1%	1.5%	10.1%	-14.3%	4.8%	11.0%
Non-Metallic Mineral Products	0.0%	-9.9%	-4.1%	-4.3%	1.5%	-14.7%	-20.7%	10.9%
Primary Metal	-12.1%	-15.5%	4.1%	31.4%	-13.4%	-5.2%	-9.1%	-54.0%
Fabricated Metal Products	2.7%	4.0%	-24.8%	3.4%	-8.2%	23.2%	-19.6%	10.8%
Machinery	-1.1%	-32.6%	8.6%	11.1%	28.6%	7.8%	-3.1%	-8.5%
Computers and Electronic Products	-12.5%	-10.0%	-30.2%	56.8%	-10.1%	12.9%	-11.4%	29.0%
Electrical Equipment, Appliances & Components	-16.1%	61.5%	-61.9%	50.0%	-29.2%	129.4%	-25.6%	31.0%
Transportation Equipment	27.7%	-22.5%	3.2%	-10.4%	2.3%	23.9%	-22.0%	12.9%
Furniture and Related Products	5.9%	-7.4%	1.0%	-10.9%	-27.8%	21.5%	-12.7%	10.1%
Miscellaneous Manufacturing	0.8%	-3.1%	-12.2%	15.7%	-12.0%	-10.0%	-1.0%	2.0%
Total Manufacturing	**3.2%**	**-9.9%**	**-13.2%**	**0.1%**	**1.4%**	**5.1%**	**-7.9%**	**6.4%**

x Suppressed to meet the confidentiality requirements of the Statistics Act

Source: Statistics Canada

Prepared by: BC Stats on February 17, 2015

TABLE 4-10: AVERAGE WEEKLY EARNINGS, BY PROVINCE

	Dollars							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia								
Manufacturing	922	936	901	935	961	986	1,002	1,003
Non-Durables	853	839	800	851	868	887	898	889
Durables	963	997	970	992	1,024	1,052	1,073	1,081
All Industries	769	789	795	818	841	865	874	895
Goods	967	998	988	1,016	1,049	1,094	1,122	1,148
Services	727	745	759	781	800	821	826	847
Alberta								
Manufacturing	1,007	1,066	1,027	1,101	1,162	1,166	1,189	1,247
Non-Durables	972	988	966	1,115	1,177	1,170	1,191	1,242
Durables	1,027	1,111	1,066	1,091	1,153	1,164	1,188	1,251
All Industries	871	922	949	991	1,034	1,071	1,108	1,149
Goods	1,185	1,272	1,321	1,393	1,440	1,494	1,557	1,638
Services	769	811	840	871	909	936	962	988
Ontario								
Manufacturing	998	1,000	950	1,000	1,007	1,037	1,051	1,072
Non-Durables	913	907	880	919	944	970	989	1,002
Durables	1,047	1,055	995	1,050	1,045	1,079	1,089	1,114
All Industries	819	838	849	881	893	906	920	938
Goods	1,026	1,040	1,015	1,055	1,069	1,095	1,115	1,148
Services	766	789	813	843	854	864	878	893
Quebec								
Manufacturing	876	882	871	908	932	948	962	967
Non-Durables	842	834	810	865	892	904	908	896
Durables	903	918	919	939	963	979	1,000	1,017
All Industries	737	751	759	784	804	823	832	849
Goods	898	920	929	967	997	1,030	1,040	1,063
Services	695	708	718	740	757	773	784	800
Canada								
Manufacturing	942	951	918	962	984	1,008	1,024	1,044
Non-Durables	878	873	848	902	929	949	962	972
Durables	984	1,003	967	1,005	1,022	1,048	1,065	1,092
All Industries	788	810	822	852	873	895	911	935
Goods	998	1,029	1,029	1,073	1,103	1,143	1,174	1,218
Services	734	757	776	803	821	838	851	871

Source: Statistics Canada
Prepared by BC Stats on April 1, 2015

TABLE 4-11: AVERAGE WEEKLY EARNINGS, BY PROVINCE (% CHANGE FROM PREVIOUS YEAR)

	% Change from Previous Year							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia								
Manufacturing	3.4%	1.6%	-3.8%	3.8%	2.8%	2.6%	1.7%	0.1%
Non-Durables	1.7%	-1.6%	-4.7%	6.4%	2.0%	2.2%	1.2%	-1.0%
Durables	4.2%	3.5%	-2.7%	2.3%	3.2%	2.7%	2.0%	0.8%
All Industries	3.4%	2.5%	0.8%	2.9%	2.7%	2.9%	1.0%	2.4%
Goods	4.7%	3.2%	-1.0%	2.9%	3.3%	4.2%	2.6%	2.2%
Services	3.0%	2.5%	1.8%	2.9%	2.4%	2.6%	0.7%	2.5%
Alberta								
Manufacturing	4.0%	5.8%	-3.6%	7.2%	5.5%	0.3%	2.0%	4.9%
Non-Durables	3.4%	1.6%	-2.3%	15.5%	5.5%	-0.6%	1.8%	4.3%
Durables	4.4%	8.1%	-4.1%	2.4%	5.6%	1.0%	2.1%	5.3%
All Industries	5.9%	5.9%	2.8%	4.5%	4.3%	3.5%	3.5%	3.7%
Goods	6.2%	7.3%	3.9%	5.4%	3.4%	3.8%	4.2%	5.2%
Services	5.7%	5.4%	3.6%	3.7%	4.3%	3.0%	2.7%	2.7%
Ontario								
Manufacturing	3.8%	0.2%	-5.0%	5.2%	0.7%	3.0%	1.4%	2.0%
Non-Durables	3.1%	-0.7%	-2.9%	4.4%	2.8%	2.7%	2.0%	1.3%
Durables	4.1%	0.8%	-5.7%	5.6%	-0.5%	3.2%	1.0%	2.3%
All Industries	3.9%	2.3%	1.3%	3.8%	1.4%	1.4%	1.6%	2.0%
Goods	4.8%	1.4%	-2.5%	4.0%	1.4%	2.4%	1.8%	3.0%
Services	3.8%	3.0%	3.0%	3.8%	1.3%	1.1%	1.6%	1.8%
Quebec								
Manufacturing	4.6%	0.6%	-1.2%	4.2%	2.7%	1.6%	1.5%	0.5%
Non-Durables	3.8%	-0.9%	-2.9%	6.9%	3.0%	1.3%	0.5%	-1.3%
Durables	5.0%	1.7%	0.1%	2.3%	2.5%	1.7%	2.2%	1.7%
All Industries	4.2%	1.9%	1.0%	3.3%	2.5%	2.4%	1.2%	2.0%
Goods	4.9%	2.4%	1.0%	4.1%	3.2%	3.2%	1.0%	2.2%
Services	4.3%	2.0%	1.3%	3.1%	2.3%	2.1%	1.4%	2.1%
Canada								
Manufacturing	4.0%	1.0%	-3.5%	4.8%	2.3%	2.4%	1.6%	2.0%
Non-Durables	3.2%	-0.6%	-2.8%	6.3%	3.0%	2.2%	1.4%	1.0%
Durables	4.5%	2.0%	-3.6%	3.9%	1.7%	2.5%	1.6%	2.6%
All Industries	4.3%	2.9%	1.5%	3.6%	2.5%	2.5%	1.8%	2.6%
Goods	5.3%	3.1%	0.0%	4.3%	2.8%	3.7%	2.6%	3.8%
Services	4.2%	3.1%	2.6%	3.4%	2.3%	2.1%	1.5%	2.3%

Source: Statistics Canada
Prepared by BC Stats on April 1, 2015

TABLE 4-12: AVERAGE WEEKLY EARNINGS, MANUFACTURING, BRITISH COLUMBIA

	Dollars							
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Non-Durable Goods Industries	**853**	**839**	**800**	**851**	**868**	**887**	**898**	**889**
Food	732	706	645	686	704	689	707	708
Beverages and Tobacco	807	x	F	F	F	F	F	818
Textile Mills and Textile Product Mills	.	.	.	.	.	.	.	.
Clothing	589	588	F	F	F	F	F	F
Leather and Allied Products	.	.	.	.	.	.	.	.
Paper	1,146	1,159	1,173	1,395	1,442	1,449	1,429	1,346
Printing and Related	820	858	782	F	829	834	835	862
Chemicals	1,012	964	927	966	1,016	1,036	1,080	F
Plastic and Rubber Products	837	819	F	888	832	894	889	879
Durable Goods Industries	**963**	**997**	**970**	**992**	**1,024**	**1,052**	**1,073**	**1,081**
Wood Products	910	934	902	941	996	1,064	1,047	1,061
Non-Metallic Mineral Products	1,002	1,041	976	953	987	F	1,010	999
Primary Metal	1,356	1,400	1,371	1,452	1,467	1,520	1,578	1,582
Fabricated Metal Products	958	999	973	916	1,016	990	1,072	1,054
Machinery	999	1,049	987	1,052	1,080	1,107	1,193	1,144
Computers and Electronic Products	1,018	1,074	1,141	1,222	1,156	1,176	1,188	1,330
Transportation Equipment	991	1,031	1,024	1,048	F	1,044	1,091	1,091
Furniture and Related Products	769	766	754	736	799	801	782	794
Miscellaneous Manufacturing	793	872	889	824	816	824	865	880
Total Manufacturing	**922**	**936**	**901**	**935**	**961**	**986**	**1,002**	**1,003**

	% Change from Previous Year							
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Non-Durable Goods Industries	**1.7%**	**-1.6%**	**-4.7%**	**6.4%**	**2.0%**	**2.2%**	**1.2%**	**-1.0%**
Food	2.2%	-3.6%	-8.6%	6.3%	2.7%	-2.2%	2.7%	0.0%
Beverages and Tobacco	0.9%	-	-	-	-	-	-	-
Textile Mills and Textile Product Mills	-	-	-	-	-	-	-	-
Clothing	7.7%	-0.1%	-	-	-	-	-	-
Leather and Allied Products	-	-	-	-	-	-	-	-
Paper	-0.1%	1.1%	1.2%	19.0%	3.4%	0.5%	-1.4%	-5.8%
Printing and Related	-1.2%	4.6%	-8.8%	-	-	0.6%	0.2%	3.2%
Chemicals	-3.3%	-4.8%	-3.8%	4.2%	5.1%	2.0%	4.2%	-
Plastic and Rubber Products	7.1%	-2.2%	-	-	-6.3%	7.4%	-0.5%	-1.2%
Durable Goods Industries	**4.2%**	**3.5%**	**-2.7%**	**2.3%**	**3.2%**	**2.7%**	**2.0%**	**0.8%**
Wood Products	3.8%	2.5%	-3.4%	4.3%	5.9%	6.8%	-1.6%	1.4%
Non-Metallic Mineral Products	4.6%	3.8%	-6.2%	-2.4%	3.7%	-	-	-1.1%
Primary Metal	11.2%	3.3%	-2.1%	5.8%	1.1%	3.6%	3.8%	0.2%
Fabricated Metal Products	8.1%	4.3%	-2.6%	-5.9%	10.9%	-2.6%	8.3%	-1.7%
Machinery	-2.3%	5.0%	-5.9%	6.6%	2.7%	2.5%	7.8%	-4.1%
Computers and Electronic Products	-4.7%	5.5%	6.2%	7.1%	-5.4%	1.8%	1.0%	11.9%
Transportation Equipment	9.7%	4.1%	-0.7%	2.4%	-	-	4.5%	0.0%
Furniture and Related Products	1.6%	-0.4%	-1.6%	-2.4%	8.6%	0.2%	-2.4%	1.5%
Miscellaneous Manufacturing	2.5%	9.9%	1.9%	-7.3%	-1.0%	0.9%	5.0%	1.6%
Total Manufacturing	**3.4%**	**1.6%**	**-3.8%**	**3.8%**	**2.8%**	**2.6%**	**1.7%**	**0.1%**

x Suppressed to meet the confidentiality requirements of the Statistics Act
. – no data
F too unreliable to be published
Source: Statistics Canada
Prepared by BC Stats on April 1, 2015

TABLE 4-13: CAPITAL EXPENDITURES, MANUFACTURING, BY PROVINCE

	$ million							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia	1,502.2	1,455.4	1,147.6	1,555.0	1,309.2	1,591.9	2,363.2	2,486.9
Alberta	2,917.0	3,113.3	1,561.5	1,462.0	1,816.9	1,714.1	1,965.8	2,346.7
Ontario	9,977.8	8,950.6	6,317.0	6,201.6	6,334.5	6,702.3	5,904.5	6,424.3
Quebec	3,877.5	4,122.9	3,094.3	3,332.5	4,610.1	4,680.1	4,288.0	4,463.8
Canada	20,623.3	19,924.6	14,357.8	15,643.3	17,648.4	17,982.0	18,072.8	18,915.6

	% of Canadian Total							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia	7%	7%	8%	10%	7%	9%	13%	13%
Alberta	14%	16%	11%	9%	10%	10%	11%	12%
Ontario	48%	45%	44%	40%	36%	37%	33%	34%
Quebec	19%	21%	22%	21%	26%	26%	24%	24%
Canada	100%	100%	100%	100%	100%	100%	100%	100%

	% Change from Previous Year							
	2007	2008	2009	2010	2011	2012	2013	2014
British Columbia	-8.2%	-3.1%	-21.1%	35.5%	-15.8%	21.6%	48.5%	5.2%
Alberta	13.7%	6.7%	-49.8%	-6.4%	24.3%	-5.7%	14.7%	19.4%
Ontario	11.1%	-10.3%	-29.4%	-1.8%	2.1%	5.8%	-11.9%	8.8%
Quebec	-4.2%	6.3%	-24.9%	7.7%	38.3%	1.5%	-8.4%	4.1%
Canada	6.6%	-3.4%	-27.9%	9.0%	12.8%	1.9%	0.5%	4.7%

Note: Data for 2014 intentions
Source: Statistics Canada
Prepared by BC Stats on February 17, 2015

TABLE 4-14: CAPITAL EXPENDITURES, MANUFACTURING, BRITISH COLUMBIA

	$ million							
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Food	81.6	76.1	53.0	184.6	99.4	123.9	98.4	94.8
Beverage	47.2	45.2	67.5	65.5	73.7	37.7	44.2	50.3
Tobacco	x	x	x	x	x	x	x	x
Textile Mills	0.2	0.3	0.2	0.1	x	x	x	x
Textile Product Mills	8.6	4.5	x	3.3	x	4.8	x	x
Clothing	2.1	1.5	x	4.3	x	x	x	x
Leather and Allied Products	0.4	x	0.5	0.1	0.1	x	x	x
Wood Products	289.9	324.2	179.5	228.3	79.6	61.8	146.4	157.9
Paper	251.3	232.5	84.7	206.7	215.4	136.7	206.0	269.2
Printing and Related	54.4	27.9	28.6	64.7	10.1	11.2	x	x
Petroleum and Coal	82.0	59.3	76.6	58.5	x	x	64.8	46.6
Chemicals	63.5	53.5	283.7	219.1	65.7	114.8	151.1	109.8
Plastics and Rubber Products	56.8	30.7	26.8	x	30.6	26.5	35.3	43.0
Non-Metallic Mineral Products	128.3	121.9	76.4	119.9	70.7	48.6	60.3	50.7
Primary Metal	198.5	219.8	54.4	175.9	x	x	x	x
Fabricated Metal Products	40.3	57.7	89.8	58.3	37.8	40.9	45.5	55.8
Machinery	23.9	31.2	15.6	32.4	41.6	53.6	50.1	x
Computers and Electronic Products	32.9	41.0	48.0	44.7	41.3	28.1	27.5	x
Electrical Equipment, Appliances & Components	7.9	37.2	15.1	12.8	16.1	13.9	x	x
Transportation Equipment	88.9	30.7	21.7	29.6	46.8	54.2	104.0	196.9
Furniture and Related Products	19.3	37.1	8.6	x	12.9	9.4	x	x
Miscellaneous Manufacturing	24.2	22.8	13.1	13.1	24.2	28.8	32.7	x
Total Manufacturing	**1,502.2**	**1,455.4**	**1,147.6**	**1,555.0**	**1,309.2**	**1,591.9**	**2,363.2**	**2,486.9**

	% Change from Previous Year							
NAICS Industry	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
Food	-17.5%	-6.7%	-30.4%	248.3%	-46.2%	24.6%	-20.6%	-3.7%
Beverage	3.5%	-4.2%	49.3%	-3.0%	12.5%	-48.8%	17.2%	13.8%
Tobacco	-	-	-	-	-	-	-	-
Textile Mills	-	50.0%	-33.3%	-50.0%	-	-	-	-
Textile Product Mills	-	-47.7%	-	-	-	-	-	-
Clothing	-34.4%	-28.6%	-	-	-	-	-	-
Leather and Allied Products	-	-	-	-80.0%	0.0%	-	-	-
Wood Products	-49.7%	11.8%	-44.6%	27.2%	-65.1%	-22.4%	136.9%	7.9%
Paper	-21.3%	-7.5%	-63.6%	144.0%	4.2%	-36.5%	50.7%	30.7%
Printing and Related	59.5%	-48.7%	2.5%	126.2%	-84.4%	10.9%	-	-
Petroleum and Coal	-23.8%	-27.7%	29.2%	-23.6%	-	-	-	-28.1%
Chemicals	243.2%	-15.7%	430.3%	-22.8%	-70.0%	74.7%	31.6%	-27.3%
Plastics and Rubber Products	38.9%	-46.0%	-12.7%	-	-	-13.4%	33.2%	21.8%
Non-Metallic Mineral Products	43.0%	-5.0%	-37.3%	56.9%	-41.0%	-31.3%	24.1%	-15.9%
Primary Metal	127.9%	10.7%	-75.3%	223.3%	-	-	-	-
Fabricated Metal Products	-5.2%	43.2%	55.6%	-35.1%	-35.2%	8.2%	11.2%	22.6%
Machinery	-28.2%	30.5%	-50.0%	107.7%	28.4%	28.8%	-6.5%	-
Computers and Electronic Products	-37.9%	24.6%	17.1%	-6.9%	-7.6%	-32.0%	-2.1%	-
Electrical Equipment, Appliances & Components	-16.0%	370.9%	-59.4%	-15.2%	25.8%	-13.7%	-	-
Transportation Equipment	123.4%	-65.5%	-29.3%	36.4%	58.1%	15.8%	91.9%	89.3%
Furniture and Related Products	-14.2%	92.2%	-76.8%	-	-	-27.1%	-	-
Miscellaneous Manufacturing	135.0%	-5.8%	-42.5%	0.0%	84.7%	19.0%	13.5%	-
Total Manufacturing	**-8.2%**	**-3.1%**	**-21.1%**	**35.5%**	**-15.8%**	**21.6%**	**48.5%**	**5.2%**

x Supressed to meet the confidentiality requirements of the Statistics Act
Note Data for 2014 are intentions
Source: Statistics Canada
Prepared by BC Stats on February 17, 2015

TABLE 4-15: BRITISH COLUMBIA DOMESTIC EXPORTS OF MANUFACTURED GOODS BY DESTINATION

	$ million							
Destination Country	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
United States	13,863.4	11,884.7	9,202.0	9,603.5	10,198.8	10,782.2	11,722.7	13,098.3
Mexico	112.2	108.7	96.5	47.3	76.2	61.6	71.5	66.3
Cent. America & Carrib. (exc. Mexico)	90.0	113.7	75.6	71.2	62.2	67.5	68.1	71.0
South America	188.9	200.1	199.6	169.3	201.5	229.8	280.0	256.4
Japan	2,113.9	2,000.8	1,428.2	1,594.1	1,559.2	1,402.5	1,591.3	1,497.5
Mainland China	1,498.6	1,446.7	1,488.4	2,392.9	3,258.0	3,375.4	3,924.0	4,124.9
Hong Kong	159.8	230.0	202.5	223.2	238.7	159.0	122.4	177.9
Taiwan	329.2	334.1	253.5	337.5	386.5	334.3	327.8	344.8
South Korea	650.6	583.1	533.4	615.4	599.2	553.1	468.3	547.3
India	148.7	111.5	52.4	80.7	76.0	73.0	107.6	124.7
South East Asia	484.4	456.4	355.4	431.5	388.4	399.6	554.7	640.2
Western Europe	1,455.9	1,391.3	999.2	1,098.5	1,079.7	1,025.1	1,016.1	1,082.2
Eastern Europe	123.7	151.6	98.9	114.0	135.3	172.3	184.8	116.6
Africa (exc. Egypt and Middle East)	61.7	75.6	69.1	66.3	93.5	113.6	117.8	116.7
Middle East	167.3	193.4	199.1	159.3	154.5	153.3	146.2	162.5
Total	**21,796.6**	**19,620.5**	**15,536.8**	**17,338.8**	**18,876.2**	**19,266.7**	**21,048.5**	**22,790.0**

Note: Domestic exports exclude re-exports
Source: BC Stats
Prepared by: BC Stats on March 1, 2015

TABLE 4-16: BRITISH COLUMBIA IMPORTS OF MANUFACTURED GOODS BY ORIGIN

	$ million							
Destination Country	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
United States	19,095.3	19,892.0	16,989.3	18,540.4	20,210.7	21,656.7	22,453.8	24,694.9
Mexico	1,564.6	1,556.3	1,420.1	1,966.5	2,302.6	2,406.4	2,529.1	2,524.9
Cent. America & Carrib. (exc. Mexico)	144.3	142.1	102.1	88.9	117.8	131.0	142.0	131.3
South America	483.2	431.4	386.1	411.6	413.2	363.9	362.2	404.5
Japan	1,457.5	1,474.2	1,131.8	1,283.8	1,295.2	1,465.0	1,345.5	1,256.6
Mainland China	4,654.0	5,136.6	4,695.0	5,361.2	6,192.9	6,485.7	6,752.1	6,906.4
Hong Kong	58.1	55.5	43.6	45.0	40.3	36.3	33.7	33.6
Taiwan	424.2	425.2	346.6	427.0	576.8	540.3	553.0	488.8
South Korea	518.6	561.5	572.7	676.1	651.1	626.8	743.8	708.5
India	236.3	256.0	218.5	247.0	271.5	307.0	318.6	350.4
South East Asia	1,019.1	1,089.0	983.2	1,094.0	1,213.7	1,266.1	1,381.0	1,506.1
Western Europe	4,238.5	4,736.3	4,275.3	4,412.4	4,946.2	5,047.9	5,379.8	5,649.6
Eastern Europe	279.9	352.6	307.2	370.4	345.5	385.3	405.6	468.5
Africa (exc. Egypt and Middle East)	74.8	73.1	69.5	77.9	101.7	71.8	73.6	109.5
Middle East	208.3	288.7	241.2	278.2	348.6	321.5	276.2	320.8
Total	**34,997.7**	**37,011.2**	**32,321.2**	**35,927.8**	**39,713.1**	**41,799.4**	**43,460.5**	**46,248.1**

Source: BC Stats
Prepared by: BC Stats on March 1, 2015

TABLE 4-17: BRITISH COLUMBIA BALANCE OF TRADE OF MANUFACTURED GOODS BY COUNTRY

	$ million							
Country	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**	**2013**	**2014**
United States	-4,987.2	-8,003.0	-7,786.3	-8,936.2	-10,008.3	-10,873.9	-10,729.8	-11,595.5
Mexico	-1,446.6	-1,440.6	-1,320.8	-1,915.8	-2,221.0	-2,339.4	-2,448.4	-2,449.8
Cent. America & Carrib. (exc. Mexico)	-47.5	-22.4	-22.8	-9.4	-48.3	-57.3	-70.0	-49.8
South America	-245.6	-215.1	-145.2	-223.1	-177.5	-104.1	-23.2	-119.7
Japan	686.4	546.6	306.3	327.9	281.7	-45.8	269.2	261.4
Mainland China	-3,095.3	-3,652.1	-3,178.9	-2,929.4	-2,864.9	-3,060.8	-2,758.6	-2,711.7
Hong Kong	173.2	220.9	193.7	207.2	237.6	143.6	104.9	167.2
Taiwan	-85.6	-84.4	-80.8	-84.8	-185.1	-203.7	-220.2	-136.3
South Korea	162.6	37.1	-22.1	-48.3	-41.2	-68.7	-270.2	-151.7
India	-80.2	-134.1	-154.3	-158.0	-188.0	-229.5	-206.8	-221.9
South East Asia	-445.6	-591.7	-598.6	-648.2	-789.7	-835.7	-795.4	-830.8
Western Europe	-2,682.8	-3,260.3	-3,205.4	-3,240.9	-3,784.0	-3,902.0	-4,208.1	-4,372.6
Eastern Europe	-143.3	-196.3	-188.3	-244.5	-189.1	-197.3	-208.8	-338.8
Africa (exc. Egypt and Middle East)	-4.7	19.5	10.8	1.4	12.9	61.4	70.2	30.8
Middle East	-28.5	-82.1	2.2	-92.2	-170.3	-156.7	-113.3	-137.1
Total	**-12,433.6**	**-17,025.8**	**-16,417.6**	**-18,270.9**	**-20,400.1**	**-22,135.8**	**-21,921.6**	**-22,914.8**

Source: BC Stats
Prepared by BC Stats on March 1, 2015

TABLE 4-18: DOMESTIC EXPORTS OF MANUFACTURED GOODS BY LEVEL OF PROCESSING BY PROVINCE ($ MILLIONS)

	Canada			British Columbia			Ontario		
Year	Primary	Secondary	% Secondary	Primary	Secondary	% Secondary	Primary	Secondary	% Secondary
2007	95,730.2	208,556.2	69	13,508.3	8,288.2	38	27,091.3	135,604.5	83
2008	98,002.7	197,895.3	67	11,470.4	8,150.1	42	26,157.0	120,522.6	82
2009	70,714.2	156,303.6	69	9,036.3	6,500.5	42	16,720.9	93,679.7	85
2010	85,489.1	168,197.8	66	11,060.3	6,278.6	36	20,271.7	105,748.8	84
2011	96,721.9	176,083.8	65	12,145.6	6,730.6	36	23,522.4	108,061.4	82
2012	95,402.8	187,323.8	66	11,846.0	7,420.6	39	22,620.5	118,389.8	84
2013	99,712.0	186,292.5	65	13,417.0	7,631.5	36	22,667.6	117,116.2	84
2014	105,272.9	204,867.5	66	14,485.6	8,304.4	36	24,217.2	128,462.3	84

	Quebec			Alberta			Rest of Canada		
Year	Primary	Secondary	% Secondary	Primary	Secondary	% Secondary	Primary	Secondary	% Secondary
2007	20,069.9	41,857.0	68	15,612.3	8,078.1	34	19,448.4	14,728.4	43
2008	21,105.6	41,720.2	66	16,548.1	9,210.0	36	22,721.6	18,292.5	45
2009	15,284.8	35,353.6	70	12,480.7	6,920.1	36	17,191.5	13,849.7	45
2010	18,134.7	34,105.7	65	15,217.2	6,523.6	30	20,805.3	15,541.2	43
2011	20,578.5	35,678.3	63	16,042.8	7,867.3	33	24,432.5	17,746.3	42
2012	20,533.4	35,797.8	64	14,803.9	8,195.1	36	25,599.0	17,520.5	41
2013	21,224.1	37,407.8	64	15,891.1	7,454.6	32	26,512.3	16,682.5	39
2014	23,003.1	43,328.1	65	18,086.8	8,048.6	31	25,480.1	16,724.2	40

Primary manufactured goods are those that are produced from raw materials and which will become inputs into other manufactured products.
Secondary manufactured goods are those that are produced using the products of other manufacturers as inputs.
Source: BC Stats
Prepared by: BC Stats on March 1, 2015

TABLE 4-19: IMPORTS OF MANUFACTURED GOODS BY LEVEL OF PROCESSING, CANADA AND BRITISH COLUMBIA ($ MILLIONS)

	Canada			British Columbia		
Year	Primary	Secondary	% Secondary	Primary	Secondary	% Secondary
2007	50,795.0	301,687.0	86	10,744.9	59,250.4	85
2008	57,508.2	306,707.0	84	12,697.4	61,324.9	83
2009	47,975.9	266,306.2	85	10,104.7	54,537.8	84
2010	54,263.5	290,175.8	84	11,424.8	60,430.8	84
2011	65,494.0	311,067.4	83	9,972.8	69,453.4	87
2012	64,744.3	328,734.2	84	10,747.3	72,851.4	87
2013	68,571.9	338,684.1	83	11,409.2	75,511.8	87
2014	76,564.8	370,794.6	83	16,344.0	76,152.2	82

Primary manufactured goods are those that are produced from raw materials and which will become inputs into other manufactured products.
Secondary manufactured goods are those that are produced using the products of other manufacturers as inputs.
Source: BC Stats
Prepared by: BC Stats on March 1, 2015

TABLE 4-20: BRITISH COLUMBIA DOMESTIC EXPORTS OF MANUFACTURED GOODS BY DESTINATION AND MODE OF TRANSPORT, 2014 ($ MILLIONS)

All Countries	Primary	Secondary	Total	% Distribution	% Secondary
Road	2,182.6	4,638.8	6,821.4	30	68
Rail	4,009.6	688.9	4,698.5	21	15
Water	8,057.1	1,590.7	9,647.7	42	16
Air	236.2	1,379.7	1,615.9	7	85
Other	0.2	6.3	6.5	0	97
Total	14,485.6	8,304.4	22,790.0	100	36

United States	Primary	Secondary	Total	% Distribution	% Secondary
Road	2,170.2	4,566.4	6,736.5	51	68
Rail	3,994.1	682.5	4,676.6	36	15
Water	1,106.2	56.2	1,162.5	9	5
Air	56.6	461.7	518.3	4	89
Other	0.0	4.5	4.5	0	100
Total	7,327.1	5,771.2	13,098.3	100	44

Japan	Primary	Secondary	Total	% Distribution	% Secondary
Road	2.5	0.8	3.2	0	23
Rail	0.0	0.0	0.0	0	26
Water	1,347.8	81.1	1,428.9	95	6
Air	23.4	41.6	64.9	4	64
Other	0.0	0.4	0.4	0	98
Total	1,373.7	123.9	1,497.5	100	8

Mainland China	Primary	Secondary	Total	% Distribution	% Secondary
Road	3.5	10.5	14.0	0	75
Rail	0.0	0.0	0.0	0	#DIV/0!
Water	3,617.1	318.7	3,935.8	95	8
Air	89.1	85.6	174.7	4	49
Other	0.1	0.2	0.4	0	62
Total	3,709.9	415.0	4,124.9	100	10

Pacific Rim	Primary	Secondary	Total	% Distribution	% Secondary
Road	9.1	19.7	28.8	0	69
Rail	0.0	0.0	0.1	0	42
Water	6,354.5	744.4	7,098.9	93	10
Air	141.4	349.7	491.1	6	71
Other	0.2	1.0	1.1	0	83
Total	6,505.2	1,114.8	7,620.1	100	15

European Union	Primary	Secondary	Total	% Distribution	% Secondary
Road	1.0	7.0	7.9	1	88
Rail	0.0	0.2	0.2	0	100
Water	351.6	378.1	729.7	68	52
Air	31.4	308.9	340.3	32	91
Other	0.0	0.3	0.3	0	96
Total	384.0	694.5	1,078.4	100	64

Notes: Domestic exports exclude re-exports
Shipments by road and rail to overseas markets represent the export of BC produced manufactured goods Trans-shipped through US Ports
Primary manufactured goods are those that are produced from raw materials which will become inputs into other manufactured products.
Secondary manufactured goods are those that are produced using the products of other manufacturers as inputs.
Source: BC Stats
Prepared by: BC Stats on February 15, 2015

TABLE 4-21: DOMESTIC GOODS EXPORTS, CANADA AND BRITISH COLUMBIA ($ MILLIONS)

	Canada			British Columbia		
Year	Manufactured Goods	All Goods	% Manuf.	Manufactured Goods	All Goods	% Manuf.
2007	304,286.5	419,943.8	72	21,796.6	31,523.6	69
2008	295,898.1	455,337.0	65	19,620.5	33,124.1	59
2009	227,017.8	334,448.4	68	15,536.8	25,240.3	62
2010	253,686.9	374,014.8	68	17,338.8	28,646.1	61
2011	272,805.6	419,035.3	65	18,876.2	32,671.5	58
2012	282,726.6	428,048.7	66	19,266.7	31,484.0	61
2013	286,004.6	443,461.3	64	21,048.5	33,426.1	63
2014	310,140.4	491,362.2	63	22,790.0	35,524.2	64

Note: Domestic exports exclude re-exports
Source: BC Stats and Statistics Canada
Prepared by: BC Stats on February 15, 2015

TABLE 4-22: B.C. INTERPROVINCIAL TRADE EXPORTS, BY DESTINATION PROVINCE ($ MILLIONS)

	All Provinces		To Alberta	
	2010	2011	2010	2011
Food and non-alcoholic beverages	2,759.5	2,808.0	909.7	908.9
Alcoholic beverages and tobacco products	427.3	346.1	210.1	193.2
Textile products, clothing, and products of leather and similar materials	125.5	79.1	24.7	13.3
Wood products	1,322.9	1,319.1	603.6	595.9
Wood pulp, paper and paper products and paper stock	411.4	404.6	174.2	191.1
Printed products and services	90.9	85.7	51.7	50.5
Refined petroleum products (except petrochemicals)	137.2	186.7	38.3	75.8
Chemical products	449.5	399.4	143.9	124.0
Plastic and rubber products	297.2	395.9	161.8	190.8
Non-metallic mineral products	261.0	267.6	146.0	172.3
Primary metallic products	363.8	666.1	111.4	177.1
Fabricated metallic products	490.3	423.8	231.6	181.5
Industrial machinery	387.6	435.7	124.3	175.3
Computer and electronic products	138.7	93.2	55.9	36.1
Electrical equipment, appliances and components	77.5	79.8	38.0	44.5
Transportation equipment	-	387.3	119.7	186.6
Motor vehicle parts	138.7	-	6.7	4.6
Furniture and related products	264.9	215.6	197.8	139.6
Other manufactured products and custom work	328.7	340.5	43.3	62.7

	To Ontario		To Quebec	
	2010	2011	2010	2011
Food and non-alcoholic beverages	917.6	955.7	489.4	540.6
Alcoholic beverages and tobacco products	88.9	74.4	40.1	8.2
Textile products, clothing, and products of leather and similar materials	52.4	35.0	31.3	12.1
Wood products	272.8	240.4	210.5	220.5
Wood pulp, paper and paper products and paper stock	101.4	80.3	66.8	50.6
Printed products and services	23.0	22.3	5.4	5.2
Refined petroleum products (except petrochemicals)	23.2	33.3	33.9	22.8
Chemical products	175.3	162.8	60.4	45.1
Plastic and rubber products	44.0	78.5	29.7	39.3
Non-metallic mineral products	37.4	40.2	17.6	13.1
Primary metallic products	159.2	372.0	40.8	33.1
Fabricated metallic products	74.5	78.3	39.2	52.4
Industrial machinery	101.7	90.0	52.0	61.8
Computer and electronic products	48.5	27.8	11.6	8.4
Electrical equipment, appliances and components	18.2	13.5	6.8	7.9
Transportation equipment	61.0	79.4	40.4	60.0
Motor vehicle parts	110.6	102.0	-	-
Furniture and related products	27.8	36.4	11.2	10.1
Other manufactured products and custom work	132.0	121.8	83.6	81.7

Source: Statistics Canada
Prepared by BC Stats on February 17, 2015

TABLE 4-23: BRITISH COLUMBIA INTERPROVINCIAL TRADE IMPORTS, BY MANUFACTURING PRODUCT, BY PROVINCE OF ORIGIN ($ MILLIONS)

	All Provinces		From Alberta	
	2010	2011	2010	2011
Food and non-alcoholic beverages	4,737.8	4,701.4	1,585.7	1,526.1
Alcoholic beverages and tobacco products	306.2	358.6	-	96.9
Textile products, clothing, and products of leather and similar materials	172.1	128.9	-	8.2
Wood products	389.3	294.5	152.9	208.7
Wood pulp, paper and paper products and paper stock	392.5	324.3	35.8	24.2
Printed products and services	207.8	218.1	40.9	31.5
Refined petroleum products (except petrochemicals)	3,309.9	4,277.2	2,541.5	3,430.4
Chemical products	1,418.2	1,410.0	279.5	339.9
Plastic and rubber products	598.3	553.1	116.0	133.6
Non-metallic mineral products	194.0	183.6	87.0	63.4
Primary metallic products	574.4	592.7	49.9	41.4
Fabricated metallic products	767.1	765.5	148.9	223.1
Industrial machinery	759.8	770.1	360.8	252.7
Computer and electronic products	318.6	214.1	10.5	2.4
Electrical equipment, appliances and components	305.1	392.5	12.5	18.9
Transportation equipment	-	871.1	26.3	22.2
Motor vehicle parts	75.5	-	13.0	13.7
Furniture and related products	301.0	284.2	37.2	36.4
Other manufactured products and custom work	480.3	468.8	69.0	60.0

	From Ontario		From Quebec	
	2010	2011	2010	2011
Food and non-alcoholic beverages	1,605.4	1,589.0	857.4	832.4
Alcoholic beverages and tobacco products	106.1	91.0	93.7	148.7
Textile products, clothing, and products of leather and similar materials	47.4	40.1	75.2	59.4
Wood products	53.8	20.1	112.9	42.6
Wood pulp, paper and paper products and paper stock	146.8	118.4	161.4	145.1
Printed products and services	86.3	132.4	45.8	24.1
Refined petroleum products (except petrochemicals)	233.5	222.0	173.6	173.2
Chemical products	663.2	627.3	310.7	253.3
Plastic and rubber products	261.8	208.2	146.2	130.2
Non-metallic mineral products	57.7	70.4	32.9	37.3
Primary metallic products	249.9	241.6	75.3	118.0
Fabricated metallic products	382.4	308.4	184.3	164.6
Industrial machinery	243.6	318.8	92.7	84.0
Computer and electronic products	229.9	114.5	51.0	83.2
Electrical equipment, appliances and components	183.3	215.5	80.6	128.1
Transportation equipment	517.7	562.0	145.9	152.2
Motor vehicle parts	47.1	27.9	9.1	14.9
Furniture and related products	163.5	142.8	48.8	42.3
Other manufactured products and custom work	257.9	272.7	127.4	108.1

Source: Statistics Canada
Prepared by: BC Stats on February 17, 2015

5. Appendix A: Defining the Manufacturing Sector

Defining the manufacturing sector

The North American Industry Classification System (NAICS), developed in 1997, was used to define the manufacturing sector. This sector comprises activities that require physical or chemical transformation of materials or substances into new products. These products may be finished, in the sense that they are ready to be used or consumed, or semi-finished, to be used as an input by another manufacturer or industry. Related activities, such as the assembly of the component parts of manufactured goods, the blending of materials, and the finishing of manufactured products by dyeing, heat-treating, plating and similar operations are also treated as manufacturing activities.

Individual establishments are classified to a particular industry based on what they primarily produce. If an establishment is involved in different types of activities, it is included in the industry from which it derives most of its revenues. Thus, an establishment that extracts ores from a mine and then processes those ores into ingots, which it then sells, would be considered a manufacturer, rather than part of the mining, oil and gas sector. Similarly, certain activities involving the transformation of goods are classified in other sectors. Examples include post-harvest activities of agricultural establishments, such as crop drying; logging, the beneficiating of mineral ores, the production of structures by construction establishments, and various activities conducted by retailers, such as meat cutting and the assembly of products such as bicycles and computers.

2012 NAICS – the version of industrial classification system utilized in this document – identifies 21 industries within the manufacturing sector. More details about specific NAICS definitions and information on sub-industries within the more broadly defined manufacturing industrial categories are available online at Statistics Canada's website (www.statcan.gc.ca).

Industries in the manufacturing sector

The following table lists the 21 broadly defined industrial groups within the manufacturing sector as identified by NAICS 2012.

NAICS	Industry Description
311	Food manufacturing
312	Beverage and tobacco product manufacturing
313	Textile mills
314	Textile product mills
315	Clothing manufacturing
316	Leather and allied product manufacturing
321	Wood product manufacturing
322	Paper manufacturing
323	Printing and related support activities
324	Petroleum and coal product manufacturing
325	Chemical manufacturing
326	Plastics and rubber products manufacturing
327	Non-metallic mineral product manufacturing
331	Primary metal manufacturing
332	Fabricated metal product manufacturing
333	Machinery manufacturing
334	Computer and electronic product manufacturing
335	Electrical equipment, appliance and component manufacturing
336	Transportation equipment manufacturing
337	Furniture and related product manufacturing
339	Miscellaneous manufacturing

6. Appendix B: Primary and Secondary Manufacturing

Primary manufacturing includes all manufacturing activities in which materials used to produce an industry's output have not been processed or changed by another manufacturer or where the final product cannot be used without further processing.

Wood manufacturers, for example, can produce either squared logs, or windows, doors and other millwork products. The former involves relatively little processing of raw materials, while the latter requires substantial labour and other inputs to transform raw materials into a finished product. Two-by-fours would be considered a primary manufactured product, while window frames would be classified as secondary. Because more effort is involved in transforming the raw materials into finished products, the GDP associated with secondary manufactured products is usually greater than is the case for primary manufacturing.

The following industries (at the five-digit NAICS level) are considered to be primary manufacturing industries. A list of secondary manufacturing industries follows.

Primary manufacturing industries

NAICS	Industry Description
31111	Animal Food
31121	Flour Milling & Malt
31122	Starch & Vegetable Fat & Oil
31131	Sugar
31132	Chocolate & Confectionery from Cacao Beans
31141	Frozen Food
31142	Fruit & Vegetable Canning, Pickling & Drying
31151	Dairy Product (except Frozen)
31161	Animal Slaughtering & Processing
31171	Seafood Product Preparation & Packaging
31192	Coffee & Tea
31212	Breweries
31213	Wineries
31214	Distilleries
31221	Tobacco Stemming & Redrying
32111	Sawmills & Wood Preservation
32121	Veneer, Plywood & Engineered Wood Product

NAICS	Industry Description
32211	Pulp Mills
32411	Petroleum Refineries
32511	Petrochemicals
32512	Industrial Gas
32513	Synthetic Dye & Pigment
32518	Other Basic Inorganic Chemical
32519	Other Basic Organic Chemical
32521	Resin & Synthetic Rubber
32712	Clay Building Material & Refractory
32721	Glass & Glass Product
32731	Cement
32741	Lime
32742	Gypsum Product
33111	Iron & Steel Mills & Ferro-Alloy
33131	Alumina & Aluminum Production & Processing
33141	Non-Ferrous Metal (except Aluminum) Smelting and Refining

Secondary manufacturing industries

NAICS	Industry Description
31123	Breakfast Cereal
31133	Confectionery from Purchased Chocolate
31134	Non-Chocolate Confectionery
31152	Ice Cream & Frozen Dessert
31181	Bread & Bakery Product
31182	Cookie, Cracker & Pasta
31183	Tortilla
31191	Snack Food
31193	Flavouring Syrup & Concentrate
31194	Seasoning & Dressing
31199	All Other Food
31211	Soft Drink & Ice
31222	Tobacco Product
31311	Fibre, Yarn & Thread Mills
31321	Broad-Woven Fabric Mills
31322	Narrow Fabric Mills & Machine Embroidery
31323	Nonwoven Fabric Mills
31324	Knit Fabric Mills
31331	Textile & Fabric Finishing
31332	Fabric Coating
31411	Carpet & Rug Mills
31412	Curtain & Linen Mills
31491	Textile Bag & Canvas Mills
31499	All Other Textile Product Mills
31511	Hosiery & Sock Mills
31519	Other Clothing Knitting Mills
31521	Cut & Sew Clothing Contracting
31522	Men's & Boys' Cut & Sew Clothing
31523	Women's & Girls' Cut & Sew Clothing
31529	Other Cut & Sew Clothing
31599	Clothing Accessories & Other Clothing
31611	Leather & Hide Tanning & Finishing
31621	Footwear
31699	Other Leather & Allied Product
32191	Millwork
32192	Wood Container & Pallet
32199	All Other Wood Product

NAICS	Industry Description
32212	Paper Mills
32213	Paperboard Mills
32221	Paperboard Container
32222	Paper Bag & Coated & Treated Paper
32223	Stationery Product
32229	Other Converted Paper Product
32311	Printing
32312	Support Activities for Printing
32412	Asphalt Paving, Roofing & Saturated Materials
32419	Other Petroleum & Coal Product
32522	Artificial & Synthetic Fibres & Filaments
32531	Fertilizer
32532	Pesticide & Other Agricultural Chemical
32541	Pharmaceutical & Medicine
32551	Paint & Coating
32552	Adhesive
32561	Soap & Cleaning Compound
32562	Toilet Preparation
32591	Printing Ink
32592	Explosives
32599	All Other Chemical Product
32611	Plastic Packaging Materials and Unlaminated Film and Sheet
32612	Plastic Pipe, Pipe Fitting, and Unlaminated Profile Shape
32613	Laminated Plastic Plate, Sheet (except Packaging), and Shape
32614	Polystyrene Foam Product
32615	Urethane & Other Foam (except Polystyrene)
32616	Plastic Bottle
32619	Other Plastic Product
32621	Tire
32622	Rubber & Plastic Hose & Belting
32629	Other Rubber Product
32711	Pottery, Ceramics & Plumbing Fixtures
32732	Ready-Mix Concrete
32733	Concrete Pipe, Brick & Block
32739	Other Concrete Product
32791	Abrasive Product
32799	All Other Non-Metallic Mineral Product
33121	Iron & Steel Pipes & Tubes from Purchased Steel
33122	Rolling & Drawing of Purchased Steel

NAICS	Industry Description
33142	Copper Rolling, Drawing, Extruding & Alloying
33149	Non-Ferrous Metal (except Copper & Aluminium) Rolling, Drawing, Extruding & Alloying
33151	Ferrous Metal Foundries
33152	Non-Ferrous Metal Foundries
33211	Forging & Stamping
33221	Cutlery & Hand Tool
33231	Plate Work & Fabricated Structural Product
33232	Ornamental & Architectural Metal Product
33241	Power Boiler & Heat Exchanger
33242	Metal Tank (Heavy Gauge)
33243	Metal Can, Box & Other Metal Container (Light)
33251	Hardware
33261	Spring & Wire Product
33271	Machine Shops
33272	Turned Product & Screw, Nut & Bolt
33281	Coating, Engraving, Heat Treating & Allied
33291	Metal Valve
33299	All Other Fabricated Metal Products
33311	Agricultural Implements
33312	Construction Machinery
33313	Mining & Oil & Gas Field Machinery
33321	Sawmill & Woodworking Machinery
33322	Rubber & Plastics Industry Machinery
33329	Other Industrial Machinery
33331	Commercial & Service Industry Machinery
33341	Ventilation, Heating, Air-Conditioning & Commercial Refrigeration Equipment
33351	Metalworking Machinery
33361	Engine, Turbine & Power Transmission Equipment
33391	Pump & Compressor
33392	Material Handling Equipment
33399	All Other General-Purpose Machinery
33411	Computer & Peripheral Equipment
33421	Telephone Apparatus
33422	Radio & Television Broadcasting & Wireless Communications Equipment
33429	Other Communications Equipment
33431	Audio & Video Equipment
33441	Semiconductor & Other Electronic Component
33451	Navigational, Measuring, Medical & Control Inst.
33461	Mfg & Reproducing Magnetic & Optical Media

NAICS	Industry Description
33511	Electric Lamp Bulb & Parts
33512	Lighting Fixture
33521	Small Electrical Appliance
33522	Major Appliance
33531	Electrical Equipment
33591	Battery
33592	Communication & Energy Wire & Cable
33593	Wiring Device
33599	All Other Electrical Equipment & Component
33611	Automobile & Light-Duty Motor Vehicle
33612	Heavy-Duty Truck
33621	Motor Vehicle Body & Trailer
33631	Motor Vehicle Gasoline Engine & Engine Parts
33632	Motor Vehicle Electrical & Electronic Equipment
33633	Motor Vehicle Steering & Suspension Components (except Spring)
33634	Motor Vehicle Brake System
33635	Motor Vehicle Transmission & Power Train Parts
33636	Motor Vehicle Seating & Interior Trim
33637	Motor Vehicle Metal Stamping
33639	Other Motor Vehicle Parts
33641	Aerospace Product & Parts
33651	Railroad Rolling Stock
33661	Ship & Boat Building
33699	Other Transportation Equipment
33711	Wood Kitchen Cabinet & Counter Top
33712	Household & Institutional Furniture
33721	Office Furniture (including Fixtures)
33791	Mattress
33792	Blind & Shade
33911	Medical Equipment & Supplies
33991	Jewellery & Silverware
33992	Sporting & Athletic Goods
33993	Doll, Toy & Game
33994	Office Supplies (except Paper)
33995	Sign
33999	All Other Miscellaneous

7. Appendix C: Glossary of Terms

Here are the definitions of some of the special industry groupings used in this document:

Goods sector

The goods sector includes the following industries, which produce goods that are either consumed by individuals or used as inputs by other industries:

- Agriculture, forestry, fishing & hunting
  - Crop & animal production
  - Forestry
  - Fishing, hunting & trapping
  - Support activities for agriculture and forestry
- Mining and oil and gas extraction
  - Mining
  - Oil and gas extraction
  - Support activities
- Construction
- Utilities (gas and electricity distribution)
- Manufacturing

Service sector

The service sector includes the following industries:

- Wholesale trade
- Retail trade
- Transportation & warehousing
- Information & cultural services
- Finance, insurance, real estate & leasing
- Professional, scientific & technical services
- Administration & support
- Education
- Health care & social assistance
- Arts, entertainment & recreation
- Accommodation & food services
- Other services
- Public administration

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